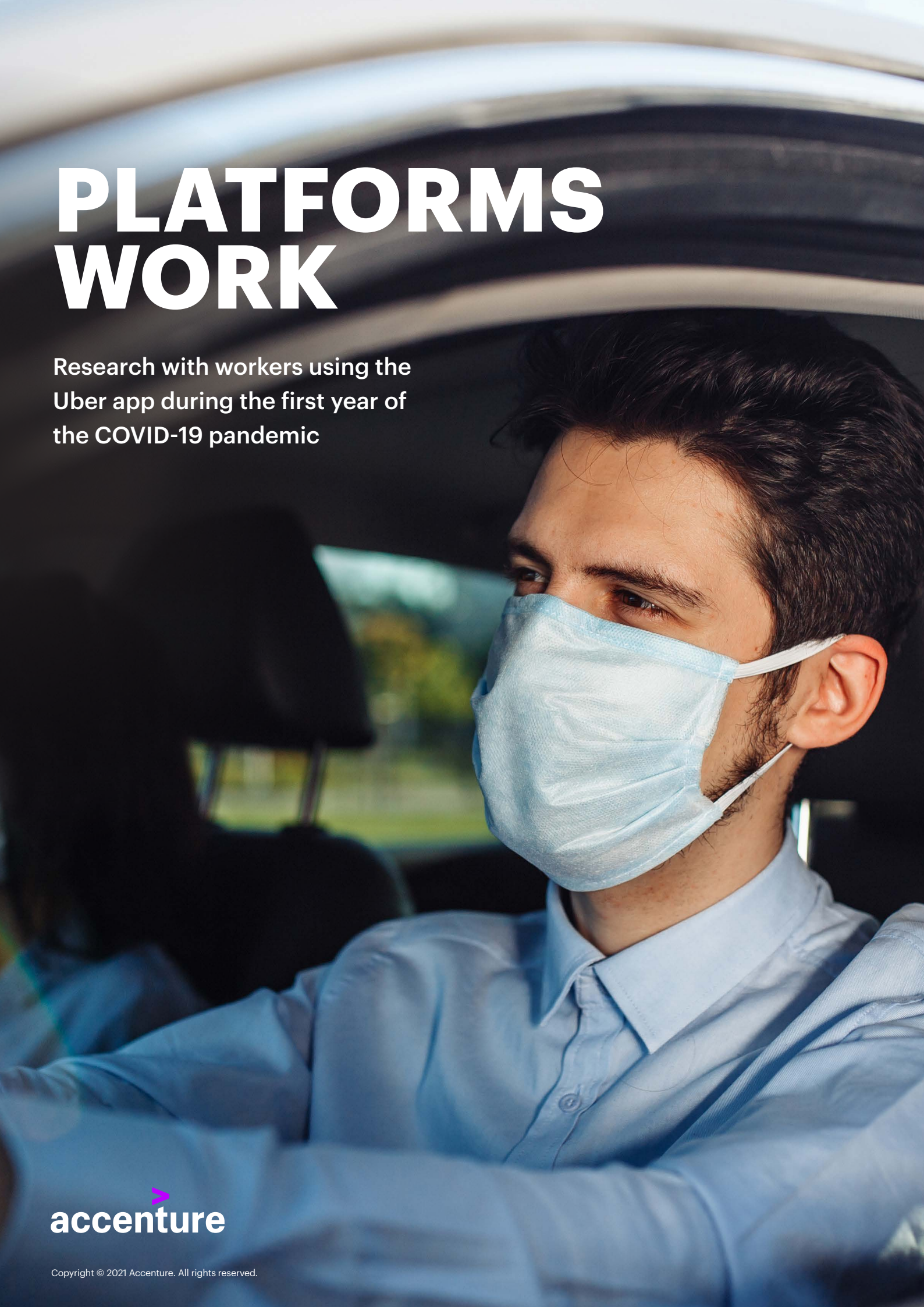
PLATFORMS WORK

Research with workers using the Uber app during the first year of the COVID-19 pandemic



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Disclaimer: The purpose of this report is to inform the general public and research community about trends in work on rideshare and delivery platforms during the COVID-19 pandemic, with a focus on the Uber platform.

The analysis in this report was commissioned by Uber and prepared by Accenture.

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COVID-19 AS A CASE STUDY ON THE ROLE OF PLATFORMS IN TIMES OF CRISIS

COVID-19 led to the biggest economic shock since the Great Depression

255 million
full-time equivalent job losses globally

Platform work was not immune

47% decline
in gross rideshare bookings

53% decline
in rideshare drivers completing trips

But it provided flexibility, enabling platform workers to manage risks

64% of new platform workers had lost a job or faced reduced hours during the pandemic

And find new opportunities

81% of new platform workers said flexibility to stop and start platform work at their own discretion helped to manage COVID-19 health

Platforms provided workers short-term benefits

Income
78% of new platform workers said income from platform work was important or an essential source of income

Safety net
79% of new platform workers said platform work acted as a financial safety net

Satisfaction
82% of new platform workers said they were satisfied with their work

Which could translate into long-term economic outcomes for platform workers

For some of those who have been hardest hit by the pandemic
Migrants, women, young people and people of color

Labor market connectivity
76% of new platform workers were optimistic about their future work opportunities and prospects

Skills
65% of new platform workers said they gained valuable skills that can help future work prospects

EXECUTIVE SUMMARY

It has been claimed that platform work can help in times of crisis, by keeping people attached to the labor market and augmenting incomes of affected households.[1]

The COVID-19 pandemic has caused the biggest economic shock since the Great Depression, disrupting economies and labor markets around the world and testing the ability of platform work to serve as a counter-cyclical stabilizer and source of resilience for workers and communities.

To prevent the virus spreading, governments began to restrict the movement of people, which in turn affected economic and business activity. Many organizations have been forced to cut wages and furlough or lay off workers, leading to massive job losses. The COVID-19 pandemic was also the first global economic crisis to affect platform workers, including rideshare drivers and delivery people.

The economic analysis in this report uses Uber data covering 7 million workers as well as a survey across six countries of 4,941 workers conducted in March and April 2021 to understand the adaptability of platform work in response to a major crisis. The purpose of this paper is to report on trends in work on rideshare and delivery platforms during the COVID-19 pandemic, with a focus on the Uber platform.

Data used for this report

This report relies on two novel data sources, as well as national statistics and a broader literature scan.

The first proprietary source is administrative data provided by Uber. This aggregated data covers more than 7 million delivery and rideshare workers in Australia, Brazil, Canada, France, the United Kingdom, and the United States between 2019 and 2020. Data used in this report includes worker sign-ups, active workers[2], and worker exits.

The second data source is a bespoke survey of delivery and rideshare workers using the Uber platform who stopped driving at the onset of COVID-19 (referred to as 'inactive workers'), as well as those who started driving during COVID-19 (referred to as 'new platform workers'). The survey was focused on these groups to study workers who left platform work and those who started platform work during the pandemic. 4,941 responses were received across the same six countries over March and April 2021. Survey responses have been weighted within each country to be representative of the driver and delivery worker population in that country. Figures quoted in this document refer to the simple average of the weighted country survey results, unless stated otherwise.

More details on data used for this report are available in the methodological appendix.

1 There have been several studies showing the effect of platform work on frictional unemployment but not to widescale labor market disruptions such as COVID-19. Previous studies: Farrell, Greig and Hamoudi (2019) Bridging the Gap: How Families Use the Online Platform Economy to Manage their Cash Flow, JP Morgan Chase Institute: Among a very large sample of account holders at JP Morgan Chase, families that experience involuntary job loss see participation rates in transportation gig work increase by 72%. Participation also declines sharply around the time a household receives their first paycheck from a new employer. Koustas (2018) Consumption Insurance and Multiple Jobs: Evidence from Rideshare Jobs, University of Chicago: Using a dataset from a large financial aggregator, this paper shows that starting rideshare work coincides with declines in payroll earnings, and offsets 73% of those losses on average. Rideshare work also reduces the sensitivity of spending with respect to main job income fluctuations by 82%; in other words, it reduces the need of households to cut back spending when their main job income dips

2 Based on workers who have completed more than 4 trips in the past 28 days

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Has platform work delivered its hypothesized benefits for platform workers?

Platform work provided access to income, acting as an alternative source of financial security

In 2020, 8.8% of working hours, equivalent to 255 million full-time jobs, were lost globally compared to the fourth quarter of 2019.[3] Some of the workers hardest hit by these losses include women, young people, and new immigrants. A number of these workers who were impacted by the COVID-19 recession turned to platform work. 64% of new platform workers surveyed had either lost a job or faced reduced hours during the pandemic.[4]

Many of the people who joined platform work during the pandemic relied on it as a source of income. More than three in four (78%) new platform workers said platform work was an important or essential source of income during the pandemic. Across countries, between 57% and 79% of new platform workers surveyed reported being ineligible for government support or not being able to access support.[5] As a result, most (79%) agreed that platform work acted as a financial safety net during the pandemic.

Platform work helped people stay connected to the labor market

The importance of accessible work opportunities during an economic crisis should not be understated. Unemployment can affect people's mental health, discourage job seekers, and ultimately lead to lower rates of workforce participation.[6] Workers surveyed for the report who lost a job during the pandemic before joining platform work indicated that a connection to the labor market helped them to maintain skills, motivation, and work habits.

Our survey results suggest that platform work helped some workers to avoid these outcomes. Across countries, between 10% and 24% of survey respondents who joined platform work during the pandemic were unemployed prior to starting. Platform work can also help improve employability: 65% of platform workers who joined during the pandemic agreed that they gained valuable skills from platform work that can help their future work prospects.

Platform work during the pandemic was more than a means to an end: it was satisfying work that fulfilled worker needs during the pandemic

Many platform workers surveyed were satisfied with their work. A recent study of couriers in Poland, found that delivery workers found a sense of mission from what was considered an essential service.[7] Despite the many challenges of COVID-19, 82% of new platform workers were satisfied with their work.[8]

During the pandemic, the flexibility offered by platform work was also deemed by those surveyed to be very valuable. On average, 81% of new platform workers reported that the flexibility to start and stop work at their discretion has helped them to manage the health risks associated with COVID-19. The flexibility of platform work also enabled a faster return to work than in other sectors affected by COVID-19 because the dynamic marketplace enables workers to restart work in response to consumer demand without a lengthy application process.

3 International Labour Organisation (ILO) (2020) ILO Monitor: COVID-19 and the world of work. Seventh edition
4 33% of new workers surveyed that joined during COVID-19 had lost a job before joining, while 10% had temporarily stopped working, and an additional 21% faced reduced hours on average across the 6 focus countries
5 While many platform workers were able to access government support during the pandemic, this was not the case for everyone. Furthermore, some new platform workers joined because they were not able to access government support. Among survey respondents, reasons for not accessing government support include: income too high (17%), difficult or time consuming to access (10%), lack of work history (17%), worker status (55%) or visa status (14%)
6 Cassidy et al. (2020) Long-term Unemployment in Australia
7 Polkowska (2020) Platform work during the COVID-19 pandemic: a case study of Glovo couriers in Poland
8 Levels of satisfaction defined as workers who reported 6 or over out of 10 for each of the aspects of work.

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While platform work has been resilient, it has not been immune to the impacts of COVID-19

Platform work itself has been affected by the pandemic. Globally, gross ridesharing bookings on Uber's Rides platform in Q4 of 2020 were 47% below pre-COVID levels.[9] The number of drivers completing trips on Uber's Rides platform in Australia, Brazil, Canada, France, the United Kingdom (UK), and the United States (US) fell by 53% from Q2 2019 to Q2 2020 on average, but is now steadily recovering.[10] Following an initial slowdown at the beginning of 2020, interest in delivery work has increased, with the number of delivery workers increasing by 13% on average across the countries studied, largely in response to a rise in demand for delivery services.

Local health and macroeconomic conditions, as well as industrial factors, all played a role in how platform work changed during the pandemic. For example, stricter COVID-19 lockdown periods coincided with larger declines in the number of active rideshare workers, while sign-ups for delivery were highest when unemployment was highest.

This is a study of the lived experience of rideshare drivers and delivery workers. It endeavors to tell the economic story of these individuals and recognize the important role played by dynamic marketplaces for work.

While this study seeks to draw out some initial and early findings on the role that platform work played in providing options for work and income during the pandemic across a range of countries, it is important to note that:

- Platform workers make up a small overall proportion[11] of the workforce.
- Each of the countries in this study are at different stages of their COVID-19 response and recovery trajectories, and further insights and more research will emerge over time.

Notwithstanding these limitations, this study seeks to better understand and identify the role that platform work can play in the context of sudden and unexpected economic disruptions and the role of dynamic marketplaces for work in promoting economic resilience.

9 Uber Technologies (2021) Uber Announces Results for Fourth Quarter and Full Year 2020
10 Year on year change from Q2 2019 to Q2 2020. Accenture analysis of Uber administrative data
11 ILO notes in the World Employment and Social Outlook that national statistical agencies have estimated platform work (which includes, amongst other kinds of digitally enabled work, rideshare and delivery work) to be in the range of 0.4 to 9% of the labor force. ILO (2021) World Employment and Social Outlook 2021 - Appendix, Table A1.2

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COVID-19 IS THE FIRST GLOBAL CRISIS TO IMPACT PLATFORM WORK

1.

1.1 COVID-19 has caused the biggest economic shock since the Great Depression

Economies and labor markets were disrupted globally

To slow the spread of the virus, governments around the world mandated widespread restrictions, which limited economic activity, leading to the most severe fall in output in almost a century.[12] Dealing with business constraints and economic uncertainty, many organizations were forced to cut wages and/or furlough or lay off workers, leading to massive job losses.[13] In 2020, 8.8% of working hours, equivalent to 255 million full-time jobs, were lost globally compared to the fourth quarter of 2019.[14] Compared to previous recessions, job losses peaked at nearly 2.5 times higher and arrived 12 times earlier in the US.[15]

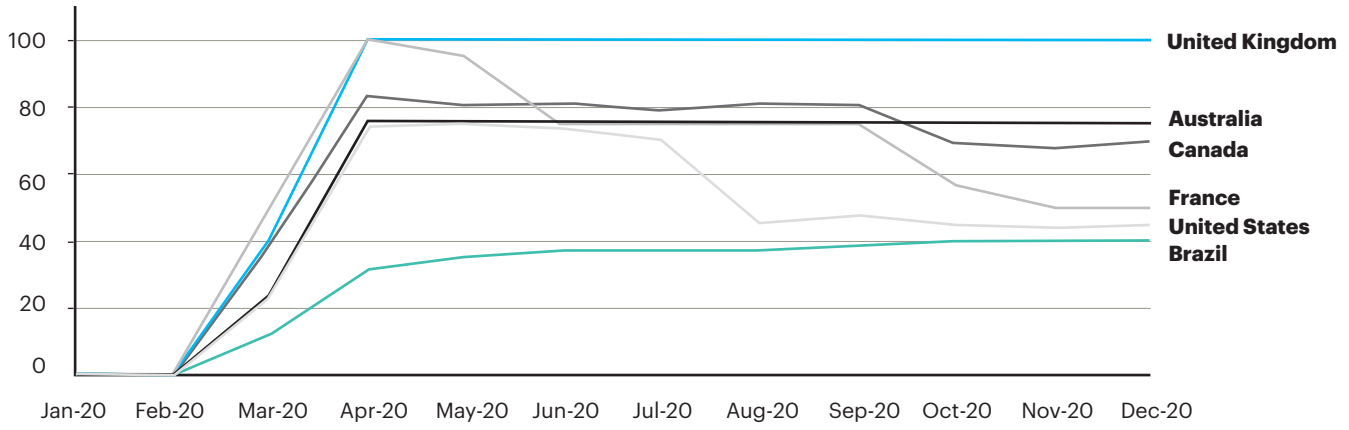
This economic crisis is different to previous ones, which have generally been triggered by a major financial or economic event leading to weak consumer and business demand. For example, during the Global Financial Crisis (GFC), the collapse of banks created ripple effects across housing and financial markets, hitting consumer and business confidence and leading to a strong fall in demand.[16] By contrast, in the case of COVID-19, an estimated two-thirds of the decline in gross domestic product (GDP) was due to a reduction in aggregate supply, according to the US Federal Reserve.[17] Direct responses to the pandemic, such as business shutdowns and disruptions to global value chains, caused the decline in spending, not job and income losses.[18] Total household spending also decreased substantially at the outset of the pandemic, falling more than 35% in the latter half of March 2020.[19] These causal differences mean that the labor market responses are much more complex to navigate for workers.

EXHIBIT 1

Economic support was highest in the UK, while support in most other countries was reduced over 2020

Government support by country

Index of economic support, 2020



Note: The Oxford Stringency Index contains an 'Economic Support Index', which measures support provided to households. The Economic Support Index is calculated daily as the simple average of two ordinal variables: household income support (including the scope of workers covered) and debt/contract relief for households. Countries can score a maximum of 2 and a minimum of 0 on these variables. Accenture has created a monthly average of this index for each country.
Source: Oxford Stringency Index (2020)

12 In 2020, world GDP fell by 3.5%. International Monetary Fund (IMF) (2021) Work Economic Outlook Update
13 Cajner et al. (2020) The U.S. labor market during the beginning of the pandemic recession
14 ILO (2020) ILO Monitor: COVID-19 and the world of work. Seventh edition
15 During the Great Recession unemployment peaked at 6.3% after 25 months, and during COVID-19 unemployment peaked at 14.5% after two months. Handwerker et al. (2020) Employment recovery in the wake of the COVID-19 pandemic
16 OECD (2015) Tracing the origins of the financial crisis
17 Bekaert, Engstrom and Ermolov (2021) Aggregate Demand and Aggregate Supply Effects of COVID-19: A Real-time Analysis
18 Cox et al. (2020) Initial impacts of the pandemic on consumer behavior: Evidence from linked income, spending, and savings data
19 Cox et al. (2020) Initial impacts of the pandemic on consumer behavior: Evidence from linked income, spending, and savings data

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Governments around the world responded to the crisis with unprecedented levels and types of financial support. Stimulus programs in 2020 were equivalent to up to 15% of GDP in some countries, up to 10 times more than the amount of support provided during the GFC.[20] Governments invested in a wide range of business and worker support programs, including wage supplements and/or income replacement, easier access to unemployment benefits, sick leave, training and development support, and access to loans.[21]

The nature of work is changing

COVID-19 has disproportionately affected industries and people who rely on in-person interactions. In the US, around 63% of jobs require a "significant onsite presence," making it difficult or impossible to work remotely.[22] Typically, restrictions have affected people in the service sector, such as those working in restaurants and retail.[23] Between February and April 2020, the biggest job cuts by percentage in the US were in arts and entertainment; recreation; and accommodation and food services. Finance and insurance services experienced the lowest levels of disruption during that time.[24]

Box 1.1.1

Economically vulnerable groups are being hit hardest by the pandemic

Most economic shocks have a greater impact on vulnerable members of society, and COVID-19 is no different. Those with lower incomes, lower levels of education, women, people of color, members of minorities, and younger people have been hit hardest by the pandemic.

In the US, job losses have been concentrated among low-wage workers: a total of 37% of workers in the bottom fifth of the wage distribution had lost their jobs between early March and late April 2020, compared with only 9% of workers in the top fifth over the same period.[25] Even after accounting for industry, business size, and age differences, high wage workers were still more likely to maintain their jobs in April 2020.[26]

Lower-income workers are overrepresented in jobs that rely on high levels of in-person interactions.[27] Although some of these workers (for example, nurses, food processing workers, janitors, maintenance workers, delivery workers, and truck drivers) became more essential as the pandemic escalated, many (for example, retail assistants and hotel workers) had their hours reduced, were furloughed, or were laid off.

When considering the role of education, research also found a 17.8% increase in unemployment in April among those whose highest education level was high school, compared to 8.8% for college-educated workers.[28] As a whole, less educated workers not only experienced worse economic effects but were also more likely to have experienced mental health issues at the height of the pandemic.[29]

In the US, despite only making up 48% of the workforce, women have accounted for 56% of workforce exits since the start of the pandemic.[30] Women are overrepresented in sectors such as retail

20 Stimulus packages were equivalent to 14.5% of GDP in the UK, 14.6% in France, 12.1% in the US, 11.8% in Canada, 14% in Australia, and 5.5% in Brazil. International Monetary Fund (2020) Policy responses to COVID-19
21 International Monetary Fund (2021) A Fair Shot. IMF Fiscal Monitor, April 2021
22 Dey et al. (2020) Ability to work from home: evidence from two surveys and implications for the labor market in the COVID-19 pandemic
23 McKinsey (2020) The next normal for Australian industries and workforces
24 Cajner et al. (2020) The U.S. labor market during the beginning of the pandemic recession
25 Lost jobs as of the end of April. Cajner et al. (2020) The U.S. labor market during the beginning of the pandemic recession. Similar trends were observed in other countries. In the UK, the bottom 10% of employees in terms of their weekly earnings were about seven times as likely to work in shutdown sectors as the top 10% of earners. In Canada, employment losses among low-wage employees, between February and April 2020, were more than twice as high as the losses among all paid employees. OECD (2020) The impact of the COVID-19 pandemic on jobs and incomes in G20 economies
26 Cajner et al. (2020) The U.S. labor market during the beginning of the pandemic recession.
27 Aucejo et al. (2020) The impact of COVID-19 on student experiences and expectations: Evidence from a survey
28 Bitler, Hoynes and Schanzenbach (2020) The Social Safety Net in the Wake of COVID-19
29 Bitler, Hoynes and Schanzenbach (2020) The Social Safety Net in the Wake of COVID-19
30 McKinsey (2021) Achieving an inclusive US economic recovery

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trade, accommodation and food services, and arts and entertainment, where the greatest decline in employment occurred.[31] In the US, women lost a net of 5.4 million jobs during the pandemic, 1 million more than men.[32] Australian Bureau of Statistics payroll data shows that in Victoria—which has been hit hard during the pandemic—women lost work at more than four times the rate of men.[33] Additionally, increased caring responsibilities due to school, child care, and other service closures made it even more challenging for women to access work. Women of color have been particularly impacted, experiencing higher rates of unemployment compared to white women in the US.[34]

People of color and minorities have also been disproportionately affected. In the US, Black communities have experienced higher rates of COVID-19 infections and deaths, and also worse economic outcomes.[35] Black people make up 45% of workers in the healthcare, retail, and accommodation and food service industries, and other personal services in the US.[36] They have also been 4.6% more likely to lose work compared to white workers in similar roles.[37] Latin communities in the US have also been severely impacted by the pandemic, with the highest unemployment rate of any group, largely due to the skills and occupational mix of workers.[38, 39] Figures from the Intensive Care National Audit and Research Centre in the UK reveal that one third of intensive care COVID-19 patients were from non-white ethnic groups—a disproportionately high figure given ethnic minorities make up just 13% of the population in England and Wales.[40] Researchers have also noted underreporting of some COVID-19 statistics with respect to migrant populations in Europe generally.[41]

In Australia, migrants on visa types that were not eligible for government support have faced similar pressures: 64% of new platform workers surveyed in Australia said that they were not eligible for government support and, of these workers, 57% reported that their visa status was the main barrier. In response, workers looked to alternative options to support themselves financially. Two-thirds (66%) of new platform workers surveyed in Australia reported that they started platform work to support themselves financially during COVID-19.

Younger people have also been adversely affected by the pandemic, finding it harder to get a job.[42] Around the world, youth unemployment increased much more than it did during the GFC.[43] Many low-income, young people have also delayed their graduation due to COVID-19 because of the challenges of entering an uncertain labor market and the implications of entering the labor market with regard to college loan repayments.[44] Young people graduating into a recession face lower earnings for up to 10 years after graduation.[45] High youth unemployment and underemployment in the aftermath of the GFC demonstrated the difficulty of reconnecting workers after they lost connection with the labor market.[46]

31 The risk is particularly high in countries like Brazil where more than 45% of total employment among women is in these four sectors. OECD (2020) The impact of the COVID-19 pandemic on jobs and incomes in G20 economies
32 U.S. Bureau of Labor Statistics (2021) Current Employment Statistics, Table B-5 and Table B-1
33 Chavan, Taksa and Yiannikis (2020) Raw deal for workplace minorities amplified by COVID-19
34 In December 2020, the unemployment rate for Hispanic and Black women aged over 20 was 9.1% and 8.4% respectively, compared to 5.7% for white women. U.S. Bureau of Labor Statistics (2021) Current Population Survey
35 Black Americans account for 12.5% of the U.S. population, they accounted for 22.4% of COVID-19 deaths. Economic Policy Institute (2020) Black workers face two of the most lethal preexisting conditions for coronavirus—racism and economic inequality; The Urban Institute (2020) How Risk of Exposure to the Coronavirus at Work Varies by Race and Ethnicity and How to Protect the Health and Well-Being of Workers and Their Families
36 McKinsey (2021) Almost half of the Black US workforce is in lower-paying, frontline-service industries; Economic Policy Institute (2020) Black workers face two of the most lethal preexisting conditions for coronavirus—racism and economic inequality
37 Bartik et al. (2020) Measuring the Labor Market at the Onset of the COVID-19 Crisis
38 U.S. Bureau of Labor Statistics (2021) Current Population Survey, Table A-4. Employment status of the civilian noninstitutional population by race, Hispanic or Latino ethnicity, sex, and age, seasonally adjusted
39 Fairlie, Couch and Xu (2020) The impacts of covid-19 on minority unemployment: first evidence from April 2020
40 Intensive Care National Audit & Research Centre (2020), Quarterly Quality Report
41 Melchior et al. (2021) Migrant status, ethnicity and COVID-19: more accurate European data are greatly needed, Clin Microbiol Infect. 2021 Feb; 27(2): 160–162
42 Research found that workers 65 and older and younger than 25 were more likely to lose work in April than workers in the 25-to-34 age group. Bartik et al. (2020) Measuring the Labor Market at the Onset of the COVID-19 Crisis
43 OECD (2020) The impact of the COVID-19 pandemic on jobs and incomes in G20 economies
44 55% expect to delay their graduation compared to 13% of students on incomes above the 'low-income' classification. Aucejo et al. (2020) The impact of COVID-19 on student experiences and expectations: Evidence from a survey
45 Andrews (2020) The career effects of labour market conditions at entry
46 OECD (2020) The impact of the COVID-19 pandemic on jobs and incomes in G20 economies

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1.2 Platform work has never before experienced a global economic crisis

Emerging in the aftermath of the Global Financial Crisis, platform work is little more than a decade old.[47] In the main, it has operated in stable economic times, and while there have been some studies into its impact on frictional unemployment little is known about how platform workers would be affected during a widespread labor market disruption or global economic crisis.[48]

Unlike those engaged in more traditional roles, platform workers may not have access to benefits and safety net protections typically tied to traditional employment, such as unemployment insurance or sick leave.[49]

Box 1.2.1.

Defining platform work

This report limits the scope of platform work to rideshare and delivery work facilitated by digital marketplaces.[50] Rideshare platforms, like those operated by Uber, Lyft, DiDi, Ola, Grab, or Bolt, connect people looking for a ride with drivers available to complete the trip in real time. Delivery platforms, like those operated by Uber Eats, DoorDash, Deliveroo, Delivery Hero, or Instacart, connect people ordering food and other items with local restaurants and merchants able to fulfill their order and delivery workers available to pick up and deliver the goods in real time. This definition excludes other types of location-based work, such as trades, domestic work, and care activities. Sizing platform work is a challenge because of the diverse range and variety of engagements. As the International Labour Organisation (ILO) notes in the World Employment and Social Outlook, national statistical agencies have estimated platform work (which includes rideshare and delivery work amongst other work) to be in the range of 0.4 to 9% of the labor force.[51]

47 Over this period, the number of rideshare and delivery platforms have grown significantly, almost tenfold in the past 10 years. ILO (2021) The role of digital labor platforms in transforming the world of work

48 There have been several studies showing the effect of platform work on frictional unemployment but not to widescale labor market disruptions such as COVID-19. Previous studies: Farrell, D., Greig, F. and Hamoudi, A. (2019) Bridging the Gap: How Families Use the Online Platform Economy oto Manage their Cash Flow, JP Morgan Chase Institute: Among a very large sample of account holders at JP Morgan Chase, families that experience involuntary job loss see participation rates in transportation gig work increase by 72%. Participation also declines sharply around the time a household receives their first paycheck from a new employer. Koustas, D. (2018) Consumption Insurance and Multiple Jobs: Evidence from Rideshare Jobs, University of Chicago: Using a dataset from a large financial aggregator, this paper shows that starting rideshare work coincides with declines in payroll earnings, and offsets 73% of those losses on average. Rideshare work also reduces the sensitivity of spending with respect to main job income fluctuations by 82%; in other words, it reduces the need of households to cut back spending when their main job income dips

49 ILO (2021) The role of digital labor platforms in transforming the world of work

50 The International Labor Organization (ILO) defines platform work into two categories: online web-based platform work (where tasks or work assignments are performed online or remotely by workers) and location-based platforms (where tasks or work are carried out in person in specified physical locations by workers, and include taxi, delivery, and home services). This report focuses exclusively on location-based taxi and delivery work

51 ILO (2021) World Employment and Social Outlook 2021 - Appendix, Table A1.2

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Box 1.2.2.

COVID-19 had a range of health and economic impacts

Each country analyzed for this report has had a different experience in responding to the health and economic consequences of COVID-19. The focus of this study is on the first year of the pandemic and accordingly we are concerned with the nature of the health and economic impacts to March 2021. Since that time there have been considerable changes in each of the countries surveyed. For the purpose of this study, we outline below the challenges that many countries still faced in March 2021.

- **US:** While the situation has since improved, as at the end of March 2021, with almost 30 million cases (8.7% of the population) and 1,150 deaths per million, the US was among the hardest hit. Each state has followed its own lockdown protocols and measures have varied across the nation. By March 2021, the federal government had pursued a substantial rescue package equivalent to 12.1% of GDP to minimize the economic impact. Economic recovery had been strong, with unemployment recovering to 6.2% in February 2021[52] after a peak of 14.8% in April 2020. The recovery is expected to continue. The US has emphasized mass vaccinations as vital to its recovery, and made strong progress on this front. As at March 2021, 28% of the population had received at least one dose of a vaccine.[53]

- **Canada:** At the end of March 2021, Canada had recorded 1 million cases (2.2% of the population) and 573 deaths per million, avoiding large-scale transmission of the virus. By March 2021, Canada's economy had been significantly affected by pandemic-related restrictions and a sharp decline in global oil prices, with GDP falling by 7.1% in 2020. However, economic recovery had been moderate, with fiscal stimulus equivalent to 11.8% of GDP.[54] Through March 2021, Canada's vaccine rollout had been slow, with only 7.3% of the population vaccinated as at March 2021. More recently, the 'third wave' has impacted Canada quite substantially which has elongated the overall economic impact of the pandemic especially in some provinces. In April 2021, national unemployment reached 8.1% with Ontario losing 153,000 jobs, and British Columbia seeing a decline of 43,000 jobs under its "circuit breaker" restrictions.[55]

- **UK:** By March 2021, with more than 4.4 million cases (approximately 6.5% of the population) and 1,881 deaths per million, the UK was among the worst hit countries in Europe.[56] It had high rates of infection, and was also stricken by a more contagious variant of the virus.[57] The government had shifted from its initial aim of achieving herd immunity, introducing tight restrictions throughout 2020 and into 2021. Up to March 2021, the UK had had three national lockdowns, with the most recent lasting more than eight weeks.[58] The economic recovery has been mixed but unemployment has not increased due to significant job retention initiatives and government support, equivalent to 14.5% of GDP.[59] Although GDP shrank by 9.9% in 2020, it is expected to recover by 4% in 2021.[60] The UK government was the first to begin vaccinations and expects almost everyone to have received a first dose by the end of July 2021. By March 2021, 45% of the population had been vaccinated.[61]

52 BLS (2021) The employment situation — February 2021
53 NPR (2021) How Is The COVID-19 Vaccination Campaign Going In Your State?
54 As at February 2021, Statistics Canada (2021) Labour Force Survey, February 2021
55 Statistics Canada (2021) Labour Force Survey, April 2021
56 OurworldinData (2021); World Bank (2019); John Hopkins University (2021)
57 Davies, et al (2021) Estimated transmissibility and impact of SARS-CoV-2 lineage B.1.1.7 in England, Centre for mathematical modelling of infectious disease (2021)
58 BBC (2021) Covid: England's third national lockdown legally comes into force
59 BBC (2021) Covid costs push government borrowing to highest since WW2
60 Office of Budget Responsibility UK (2021) Economic and Fiscal Outlook - March 2021
61 BBC (2021) COVID Vaccinations Visualisation

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- **France:** Having seen more than 4 million cases (5.6% of population) and 1,301 deaths per million by March 2021, France has also been significantly affected by COVID-19. After an initial decline in cases following the first wave, France was hit hard by a strong second wave, leading to strict restrictions including an eight-week curfew with lockdowns, which continued into 2021.[62] France's pandemic response was largely consistent nationally. The economic recovery has been positive, with unemployment shrinking to around 8% (after being as high as 9.4% in July 2020).[63] GDP fell by 8.2% in 2020 and is expected to recover by 5.5% in 2021.[64] The country is expecting almost everyone to be vaccinated by July or August 2021, although initial rollout has been slow. As at March 2021, 12% of the population had been vaccinated.[65]

- **Brazil:** With more than 10 million cases[66] (4.8% of the population) and (1,164 deaths per million) by March 2021, Brazil's economy and healthcare system had been significantly disrupted by COVID-19. Brazil became the second nation in the world to hit 1 million cases. The country's economy was also harmed by a fall in commodity prices, and unemployment has only recovered marginally, to 13.9% (after being as high as 14.6% in September 2020). After GDP fell by 5.8% in 2020, the recovery had to March 2021 been moderate, with GDP expected to recover by 3.6% over the year in 2021. Brazil has previously announced that it was expecting a quarter of its population to be vaccinated by mid-year, and it had also been trialling small-scale localized mass vaccination efforts to achieve herd immunity. By March 2021, 7% of the population had been vaccinated.[67]

- **Australia:** Up till March 2021, with only 28,000 cases (0.1% of the population) and (35 deaths per million), Australia has been relatively spared by the pandemic. However, its GDP fell by 4.2% in 2020, resulting in Australia's first recession in nearly 30 years. The country had a national lockdown in March and April 2020, followed by renewed lockdown measures in specific states, including a long lockdown in Victoria. The economic recovery has been assisted by generous relief packages valued at around 14% of GDP. Recovery has been strong, with unemployment recovering to 6.4%[68] (after being as high as 7.5% in July 2020), and a GDP increase of 3.5% is anticipated for 2021. Australia's vaccine rollout has been slowest amongst peer nations and the government has not set a revised target date, with only 0.35% of the population vaccinated as at March 2021.

62 Government of France (2021) Restrictions and requirements in metropolitan France
63 Trading Economics (2021) France Unemployment Rate
64 Banque de France (2021) Macroeconomic projections – March 2021
65 Statista (2021) Number of vaccines administered against COVID-19 in France 2021
66 Brazil's low testing rate combined with its underreporting rate of around 40.68% mean this number is likely far greater; Silva et al. (2020) COVID-19 Mortality Underreporting in Brazil: Analysis of Data From Government Internet Portals
67 Our World in Data (2021) COVID vaccinations: Brazil
68 As at February 2021; ABS (2021) Employment and Unemployment

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EXHIBIT 2

Summary of Health and Economic Impacts across countries studied

	Health impact		Economic impact			
	1 millionth case	**Infected population**	**GDP impact (2020)**	**Peak unemployment**	**Intensity of restrictions[1]**	**Example of restrictions**
	in 4 months	7.00%	-4.3%	14.8% (Apr)	17%	Highly variable by state, with a mixture of stay-at-home orders, masks, and business closures enforced to varying degrees (e.g. 6 weeks in New York)
	in 16 months*	1.80%	-7.1%	13.7% (May)	25%	Partial lockdown including ban on gatherings, mask mandates and reduced business capacity across all provinces, which lasted for more than 2 months
	in 10 months	4.60%	-9.8%	4.9% (Sep)	67%	3 national lockdowns, totaling over 5 months across 2020 and 2021
	in 10 months	4.30%	-9.8%	9.4% (Jul)	50%	3 national lockdowns, including a curfew, totaling over 6 months across 2020 and 2021
	in 4 months	3.80%	-5.8%	14.6% (Sep)	50%	Partial regional lockdowns beginning in March, lasting up 9 months in certain states (including Sao Paulo)
	~30k cases[2]	0.10%	-4.2%	7.5% (Jul)	42%	2-month initial national lockdown followed by a localized 3-month strict lockdown of Victoria

1. Measured as months spent in lockdown with a stringency level of > 65 as measured by the Oxford index, divided by the total months (note that each country's stringency index was averaged on a monthly basis)
2. Cumulative cases as at March 2020
Source: Johns Hopkins Coronavirus Resource Center, Government Health Websites, IMF, OECD

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Box 1.2.3

Report data sources

This report uses four key data sources: a worker survey, Uber administrative data, academic papers, and various publicly available data sources.

YouGov conducted an online survey in March and April 2021 among rideshare and delivery drivers who used the Uber platform in Australia, Brazil, Canada, France, the UK and the US, with approximately 820 respondents per country, and a total of 4,941 respondents.

The survey focused on two audiences - 'new platform workers' who started driving during COVID-19, and 'inactive workers' who drove before COVID-19 but stopped driving during the pandemic. The survey was focused on these groups to study workers who left platform work and those who started platform work during the pandemic. Worker contact details were securely provided to YouGov by Uber.

We have weighted the survey data to ensure each sample is representative of rideshare and delivery workers on Uber's platforms in these countries. This data provides insights into the demographics, motivations, and experiences of workers before and during the pandemic.

Neither Uber nor Accenture received personally identifiable information (PII) survey data. In the survey, workers were assured that their responses were anonymous and encouraged to answer honestly. Questions were appropriately localized.

The Uber data includes aggregated data covering more than 7 million delivery and rideshare workers in the same six countries between 2019 and 2020. Data used in this report includes worker sign-ups, active workers, worker exits, median earnings, and hours worked. Given that Uber is the only major global platform engaged in ridesharing and delivery, their administrative data is an invaluable source for understanding the impact of the pandemic on platform workers.[69]

Academic papers and publicly available data were also used to contextualize analysis, supplement data, and support report findings.

69 Internationally comparable statistics or accurate estimates of the total scope of platform work are not currently available as most national statistics agencies do not include platform workers in standard labor force and household surveys

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EXHIBIT 3

A wide range of data sources have been used for this report

Source: New, six-country survey for the report

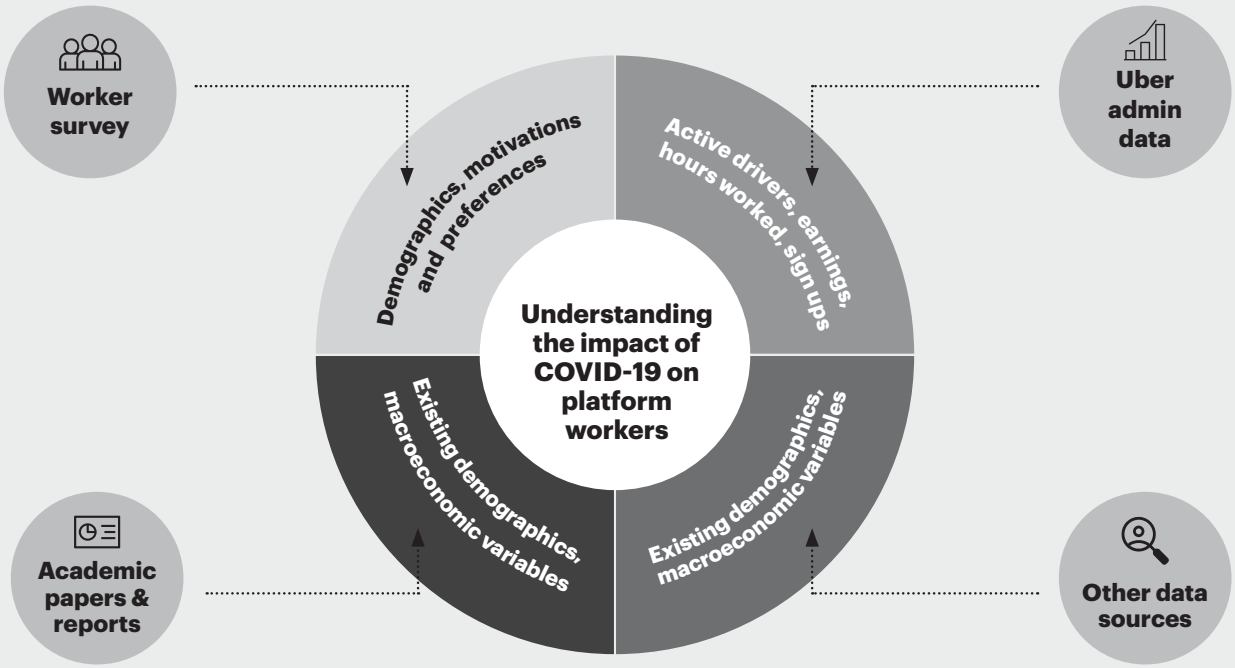
Sample: 4,941 delivery and rideshare workers across 6 countries

Use: Understanding worker demographics, motivations, and experiences

Source: Uber admin data

Sample: Aggregate data on over 2 million active drivers every month in 6 countries between 2019 and 2020 for rideshare and delivery workers

Use: Worker sign ups and exits, median earnings, and hours worked



Source: Multiple (e.g. ILO, OECD, Hall et al.)

Use: Augmenting and informing analysis and findings with other relevant reports and academic research

Source: Multiple (e.g. National Bureau Data, World Health Organization, and Oxford University Stringency Index)

Use: Contextualizing analysis through key macroeconomic variables and pre-pandemic data

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DESPITE CHANGES IN RIDESHARE AND DELIVERY, FLEXIBILITY AND ACCESS TO INCOME BECAME STRONGER MOTIVATORS AS WORKERS SURVEYED STAYED SATISFIED

2.

2.1 COVID-19 suppressed demand for rideshare and enabled strong growth in delivery

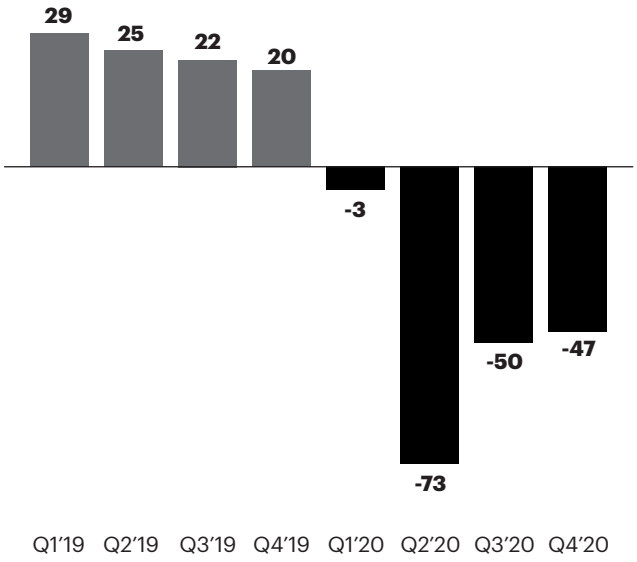
To prevent the spread of the COVID-19 virus, governments around the world restricted the movement of people, closing borders, designating essential services, and in some cases implementing curfews. This disruption and controls imposed on the movement of people negatively impacted the availability of work and income through ridesharing but increased reliance on delivery offered new opportunities. Uber's global Rides gross bookings in Q4 of 2020 remained 47% below pre-COVID levels. Conversely, the pandemic led to a surge in demand for food delivery, with quarterly booking growth consistently higher than before the pandemic. For instance, in Australia, consumer spending on food delivery quickly rose to be three times higher than pre-COVID levels and as cities emerged from lockdowns and restaurant spending returned to normal levels, food delivery spending continued to remain at those elevated levels.[70]

EXHIBIT 4

COVID-19 has suppressed rideshare while enabling strong growth in delivery

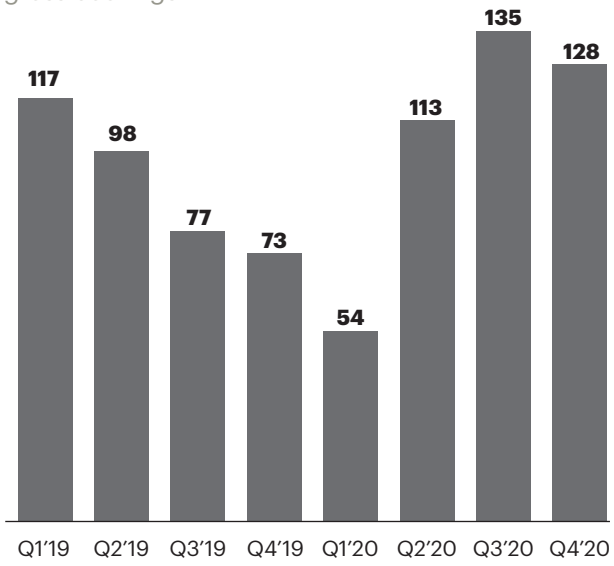
Rideshare has been disrupted by the pandemic and is steadily recovering to pre-COVID levels

% year-on-year change in Uber mobility gross bookings



Despite an initial slowdown at the beginning of COVID-19, delivery has rebounded due to strong demand

% Year-on-year (YoY) change in Uber delivery gross bookings



Source: Uber Financial results (2021)

As the availability of work and the income that could be generated from that work changed, so did the number of active workers. Dynamic platforms, especially in ridesharing and delivery, allow workers to enter and leave platforms at their discretion, so worker activity and engagement shifted in response to new demand patterns. Trends in the number of active workers are also driven by factors such as income pressures, perceived safety, and demand for flexibility. As a result, while the number of active workers tended to respond to consumer demand in most of the countries studied over 2020, the level of engagement in work is not perfectly correlated with demand, which in turn impacts worker earnings. This variation is explored in more depth in Section 3. In this section, we highlight some broad trends in how workers reacted to changed circumstances and draw some initial findings about key motivating factors for engaging and re-engaging in platform work.

70 Accenture (2021), Making delivery work for everyone, March 2021

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Box: 2.1.1

Delivery was the only sector where both earnings and the number of workers increased during 2020

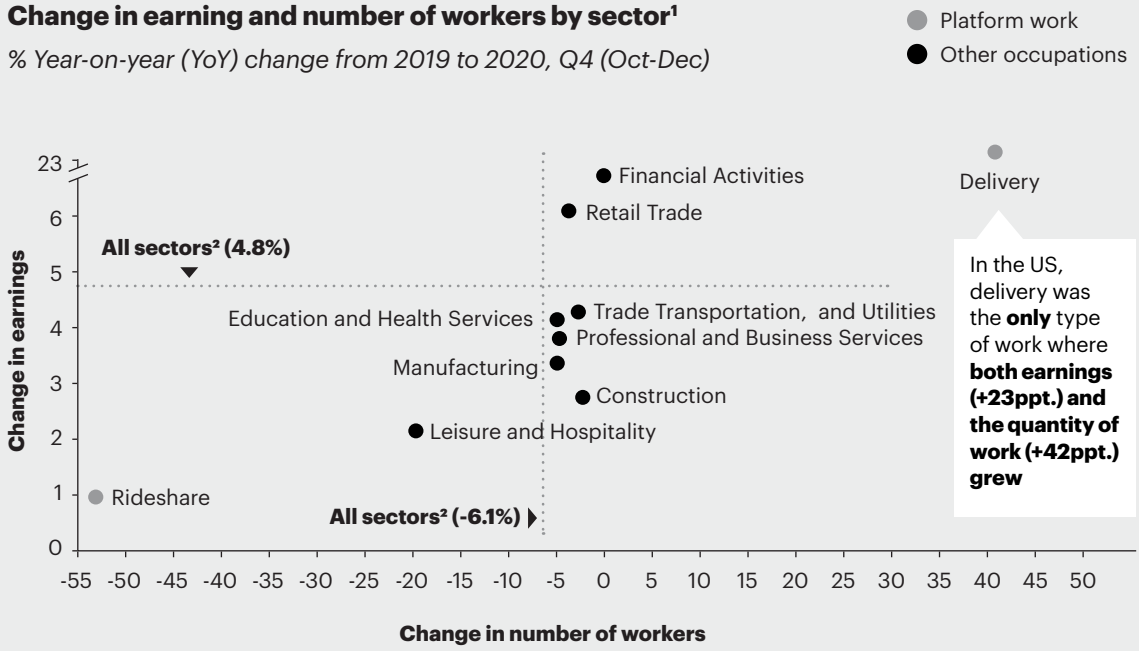
Many sectors of the economy were significantly impacted by the pandemic. In the US, many businesses cut staff and wages.[71] Overall, nominal wages rose in most sectors, up 4.8% across all private sector workers. However, a smaller number of workers were able to access these wages, as these sectors simultaneously experienced a significant reduction in work. The quantity of private sector jobs fell by 6.1%. Using the change in the number of active workers on Uber's platforms as a proxy for the change in earnings opportunities available in these sectors, delivery was the only sector where both earnings and the quantity of work rose, up 23% and 42% respectively.

CASE STUDY 1: United States

Delivery was the only sector where both the earnings and the number of workers increased

Change in earning and number of workers by sector[1]

% Year-on-year (YoY) change from 2019 to 2020, Q4 (Oct-Dec)



Notes: 1. Hourly earnings are seasonally adjusted for other occupations but not for platform work. Other occupations refer to average hourly wages while platform work refers to median earnings per hour online
2. References to change across all private sector workers
Source: Uber administrative data (2021); U.S. Bureau of Labor Statistics (2021); Accenture analysis

71 In the US, twice as many workers (~11%) have had their wages cut compared to during the 2007-2009 recession. Cajner et al. (2020) The U.S. labor market during the beginning of the pandemic recession

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Opportunities were also created for workers to move between different types of platform work and increase the resilience of platform workers. For example, in the US and UK, Uber launched a Work Hub to help rideshare workers find alternative earning opportunities through the company's various platforms such as food delivery through Uber Eats or carrying or delivering cargo through Uber Freight.[72] In certain US cities, the Work Hub also enabled rideshare drivers to connect to work opportunities outside the Uber platform in industries such as food production, warehouse logistics, and customer service. In the UK, Uber partnered with companies like Adecco, Hermes, Yodel, and others, to get drivers connected to jobs.

Following a steep initial drop, by the end of 2020, the number of rideshare workers has recovered to within 25% of pre-COVID levels in most countries

At the beginning of the pandemic, the number of rideshare workers actively seeking work in the study countries fell by 53%.[73] Rideshare drivers who stopped working during the pandemic said their decisions were based on a number of factors including health and safety risks of COVID-19 (51%) and earnings not being high enough (52%). Over the same period, the number of delivery workers on Uber's platform initially increased across most of these countries, up 13% from Q2 2019 to Q2 2020.

In most countries, rideshare demand associated with international tourism, corporate travel, nightlife, and pooled services remained depressed throughout 2020. The physical distancing possible in cars, along with mask requirements and clear guidelines for riders and drivers, made rideshare a transport option for those wishing to socially distance.

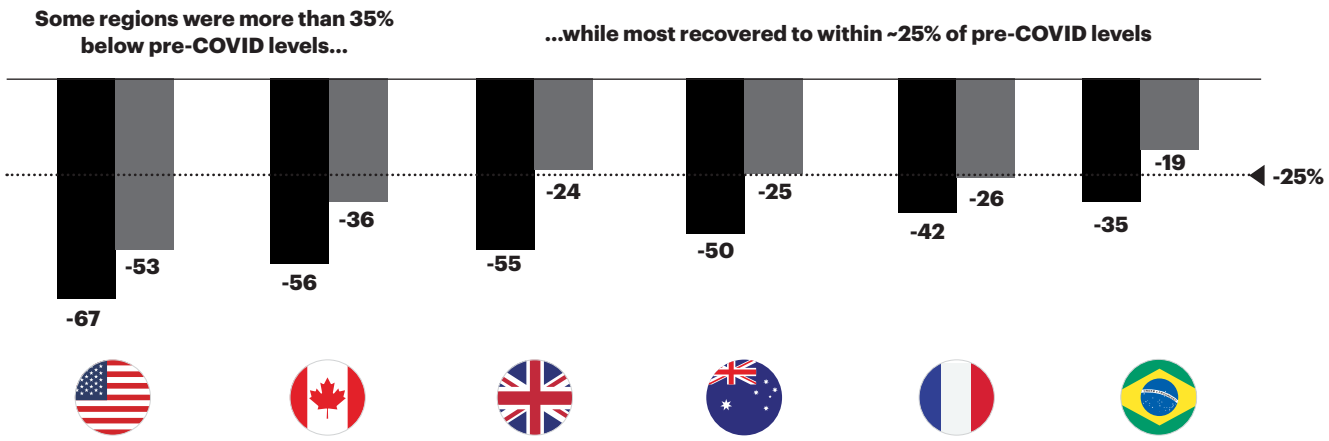
Since the initial fall in Q2, rideshare work in Brazil, Australia, the UK, and France recovered steadily. Rideshare driver numbers in both the US and Canada were still well below 2019 levels at the end of 2020, likely due to a combination of public health restrictions, personal health concerns, and generous government support. For instance, the Coronavirus Aid, Relief, and Economic Security (CARES) Act in the US covered independent workers like the rideshare drivers and delivery people on Uber's platforms and enabled them to access unemployment assistance.

EXHIBIT 5

Following a steep initial shock to the number of active drivers at the start of the crisis, most countries have recovered to within 25% of 2019 levels

Active Uber rideshare workers[1]

% change from 2019 to 2020 (for Q2 and Q4)



Note: 1. Refers to workers who undertook more than 4 trips in the month
Source: Uber administrative data (2021), Accenture analysis

72 Uber (2020) Introducing the Work Hub, a new way for drivers to find essential work
73 The number of drivers completing trips on Uber's Rides platform in Australia, Brazil, Canada, France, the UK, and the US fell by 53% from Q2 2019 to Q2 2020 (unweighted average across countries). Accenture analysis of Uber administrative data

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The recovery in the number of active rideshare workers in 2021 is also a function of the return of economic activity as vaccine rates improved and cities opened up. In spring 2021 in the US, for example, drivers had not returned to rideshare work as quickly as rider demand had increased. To encourage rideshare workers to return and ensure first-time workers maximize their earnings, in the US, Uber introduced a $250 million driver stimulus in early April.[74] These additional incentives sit on top of temporarily elevated earnings resulting from the short-term mismatch between demand and supply. As the recovery continues, more workers are expected to engage in rideshare work, which could see over time earnings returning to pre-pandemic levels.

Demand for delivery services soared during the pandemic and the number of delivery workers actively seeking work through Uber increased by more than 40% in most study countries

Following the initial increase in the number of workers making themselves available for delivery work on Uber's platform during Q2 2020, the number of delivery workers continued to grow in most countries. The US, Canada, the UK, and France recorded significant increases in the number of delivery workers looking to earn on Uber Eats. Relative to rideshare, the initial impact of the pandemic on delivery was more varied. Most countries experienced an increase in the number of delivery workers, due to high levels of food delivery take-up. Consumer preferences for the safety and convenience of delivery can explain some of the growth in the sector.[75] Growth was particularly high in some countries like the UK and France, where prolonged national lockdowns and restrictions prevented restaurant dining. Throughout COVID-19, many delivery platforms have also expanded offerings to include grocery, pharmacy, and other non-food items, further increasing demand for delivery and the availability of delivery work.

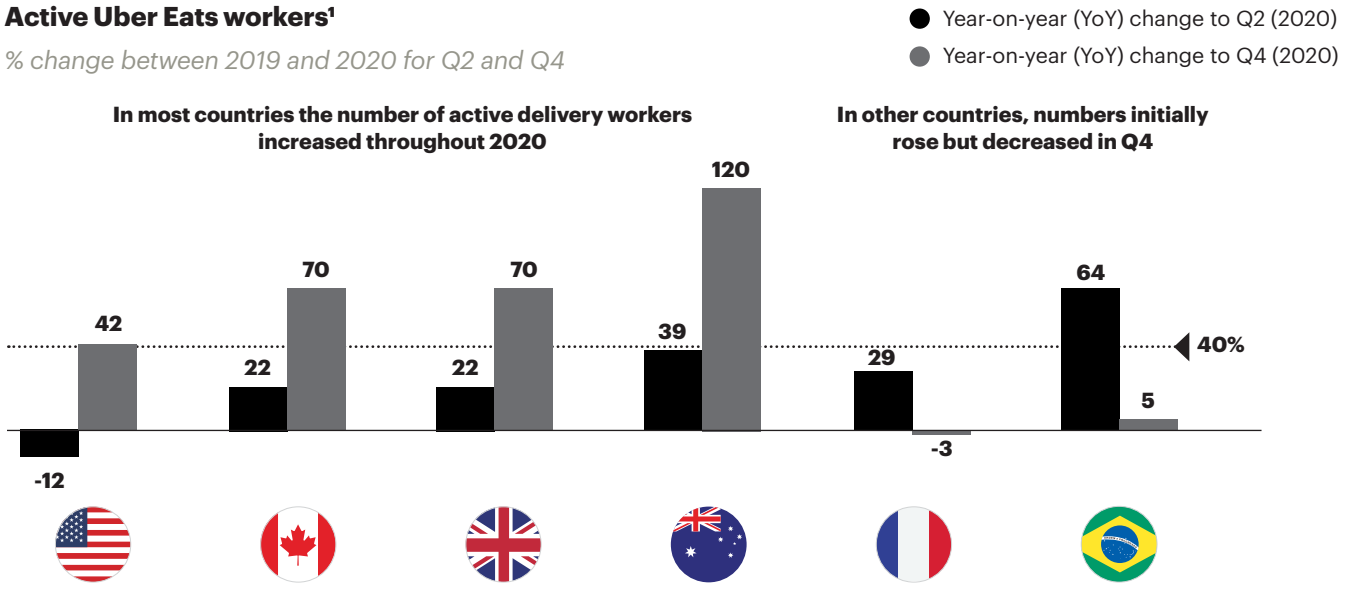
Conversely, in Brazil and Australia, the number of delivery workers active on Uber's platform grew initially in Q2 but returned to 2019 levels by Q4. This moderation may have been the result of a number of factors. For example, in both Australia and Brazil, restaurants reopened or remained open during Q4. Further, Q4 is summer in the southern hemisphere; during warmer summer months, when it is more comfortable to eat at restaurants with outdoor seating, people may have been ordering in less. Local market structures also play a role. For example, there are multiple delivery apps which compete to attract platform workers.

EXHIBIT 6

The majority of countries saw the number of delivery workers increase by more than 40% during COVID-19

Active Uber Eats workers[1]

% change between 2019 and 2020 for Q2 and Q4



Note: 1. Refers to workers who undertook more than 4 trips in the month
Source: Uber administrative data (2021), Accenture analysis

74 Uber (2021) Getting Drivers Back on the Road
75 KPMG (2020) Pleasing customers during a pandemic

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2.2 Flexibility and access to income remained stronger motivators throughout the pandemic

Workers who started platform work during the COVID-19 pandemic said they did so because it provides flexibility and access to income. This is consistent with pre-COVID-19 behaviour. It is a well studied phenomenon that platform workers choose this type of work primarily due to the flexibility to set and manage their own schedules.[76] 49% of new platform workers surveyed were undertaking other part-time or full-time work, while 19% of new platform workers surveyed were undertaking study while working during the pandemic and 7% were providing caregiving support. Previously, researchers have estimated that the flexibility to freely set and adapt work schedules to unpredictable shocks was valued at roughly $150 per week on average.[77] This is especially the case for younger people, women, and lower-income people who tend to benefit the most from flexible work arrangements. Platform workers typically prioritize flexibility over benefits and security usually associated with traditional employment. In one study, only 40% of workers would stop driving with Uber if they were offered full-time salaried worked that provides the same total income (from Uber and other labor sources). The monthly salary they report to require taking another job is more than two times —on average—what they currently make using the Uber platform.[78] During COVID-19, the importance of flexible work has only become more critical. 81% of new workers surveyed for this study have reported that the flexibility to start and stop work at any point has helped them to manage the health risks of COVID-19.[79] Flexibility was most important in Australia (87%) and least important in France (71%). Many workers have also had to pick up additional responsibilities like homeschooling and caring duties.[80] The ability to choose when and where to work in real time has allowed workers to maintain access to income, while also allowing them to meet their personal commitments.[81] Additionally, flexibility enabled workers to engage in other types of work. Half of new workers (49%) were also engaged in other non-platform part-time or full-time paid work. While the majority of new workers surveyed use only one app for work, more than a third use multiple platforms for work.

Access to income has also become more important during the pandemic. The economic impacts of COVID-19 have left many platform workers in challenging financial situations.[82] 81% of new workers surveyed said that making ends meet was a motivator for joining platform work. This varied by country. For example, 89% of new workers in Brazil noted this as a motivator, compared to 76% of new workers in Canada. Of the workers surveyed whose previous employment was impacted by COVID-19, and for those unable to access government benefits, many reported that easy to access flexible work acted like a secondary financial safety net.

Platform work provided an essential source of income for some workers during the pandemic

During COVID-19, platform work—especially delivery work—has remained an essential source of income for some workers. 78% of new rideshare and delivery workers surveyed reported their earnings from this work as important or essential. 42% of new platform workers signed up during the pandemic because they could not find other work. As we'll discuss in Section 4.2 and as reported by workers surveyed, platform work acted as a financial safety net for workers who were impacted by COVID-19 or were unable to access government support.

76 A US survey found 86% of respondents chose app-based driving to have flexibility in their schedule. Uber (2020) Survey of likely 2020 Voters and app-based Drivers; In Australia 78% of respondents joined Uber for the flexibility to balance their work, study and family commitments. AlphaBeta (2019) Flexibility and Fairness; In France, 72% of delivery workers considered flexibility and independence to be the most important aspect of their work Uber (2020) Consultation des livreurs; In the UK, flexibility has been identified as an important motivator and has been linked to higher levels of satisfaction. Berger et al. (2020) Uber Happy? Work and Well-being in the "Gig Economy"

77 The surplus individuals derive from their work is defined as the amount earned above their reservation wage: the minimum amount of earnings at which they'd be willing to work. Under a flexible working arrangement, drivers derive $150 per week in surplus on average, eight times as much as they would under a more rigid scheduling system. Chen et al. (2019) The Value of Flexible Work: Evidence from Uber Drivers. Chen et al., (2020) Suppliers and Demanders of Flexibility: The Demographics of Gig Work

78 Azuara et al. (2019) Who drives on ride-hailing platforms in Latin America? A profile of Uber drivers in Brazil, Chile, Colombia and Mexico, Labor Markets Division, Inter-American Development Bank, Technical Note No. IDB-TN-1779

79 Individual workers have had the freedom to start and stop work in regions and at times when the health risks are personally acceptable. As outbreaks occurred in real-time, platform workers were able to immediately stop

80 7% of new platform workers were engaging in caregiving activities during the pandemic on average across the six focus countries

81 Historically, flexibility is a rare feature for low income work and has traditionally only been available in high income work. Mas and Pallais (2020) Alternative Work Arrangements

82 48% of drivers in Europe said financial difficulties have been their top concern in 2020. Uber (2021) A Better Deal for European Platform Workers

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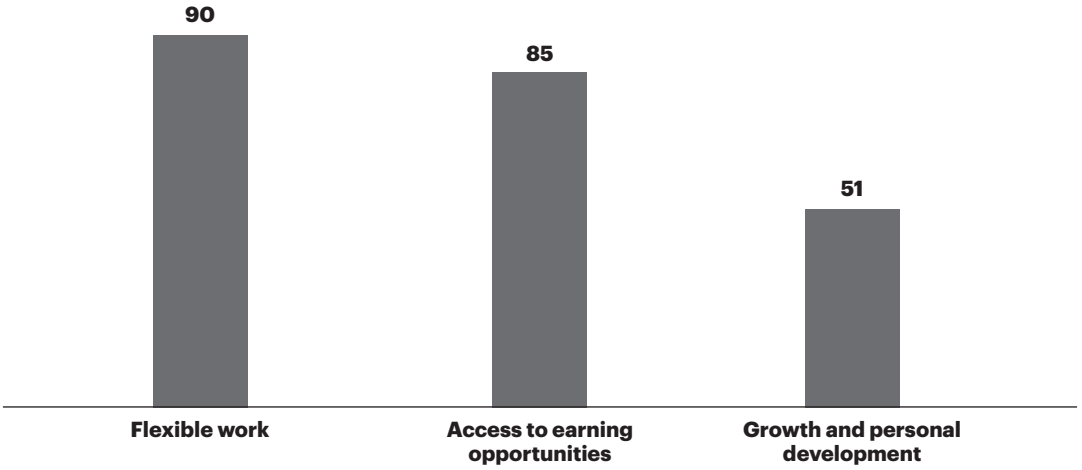
EXHIBIT 7

Flexibility and access to income were strong motivators for joining platform work during the pandemic

Motivations to join rideshare or delivery work

% of platform workers who said the following factor was some motivation or a major motivation when signing up during the pandemic, average across US, Canada, UK, France, Brazil, Australia



Source: YouGov and Accenture (2021), Accenture analysis

2.3 Despite the challenges of the pandemic, 82% of survey respondents who began platform work during the pandemic were satisfied with their work

New delivery and rideshare workers surveyed were satisfied with their work

Rideshare and delivery workers who began platform work during the pandemic reported high levels of satisfaction. More than 4 in 5 of all rideshare and delivery workers surveyed were satisfied with their work.[83] High satisfaction could be explained by several factors, including an increased reliance on platform work income due to fewer alternative work options, the need for more flexible work during the pandemic,[84] or more respect and recognition for their work.[85]

There were slight geographical variations between countries as shown in the exhibit, with higher satisfaction reported in the US and Canada than in Brazil and France.

Rideshare and delivery workers have faced several challenges working throughout the pandemic. Many workers provided essential services to their communities, despite the personal risk involved. Rideshare workers also faced higher levels of uncertainty about the availability and quality of work. For some workers these conditions were stressful, but other studies have found that delivery workers have experienced lower levels of stress and anxiety during the pandemic than other workers.[86] In another case study in Poland, delivery workers also reported a greater sense of mission.[87]

83 Accenture's multi-country survey uses a numerical scale to understand and measure satisfaction. There are other approaches to measuring satisfaction which use fewer categories and may yield different results. The numerical scale has been used to better account for the variance between countries. Respondents were asked how they would rate their satisfaction of rideshare / delivery work on a scale between 0 and 10, where 0 is 'Totally dissatisfied' and 10 is 'Totally satisfied'. For the purposes of this report, a high satisfaction score is defined as any rating above 6
84 Prior to the pandemic, flexibility was linked to higher levels of satisfaction. Berger et al. (2020) Uber Happy? Work and Well-being in the "Gig Economy"
85 54% of new rideshare and delivery workers said they gained more recognition and respect during the COVID-19 pandemic
86 Even after controlling for age, family situation, lost income, and other factors. Apouey et al. (2020) Gig Workers during the COVID-19 Crisis in France: Financial Precarity and Mental Well-Being
87 Polkowska (2020) Platform work during the COVID-19 pandemic: a case study of Glovo couriers in Poland

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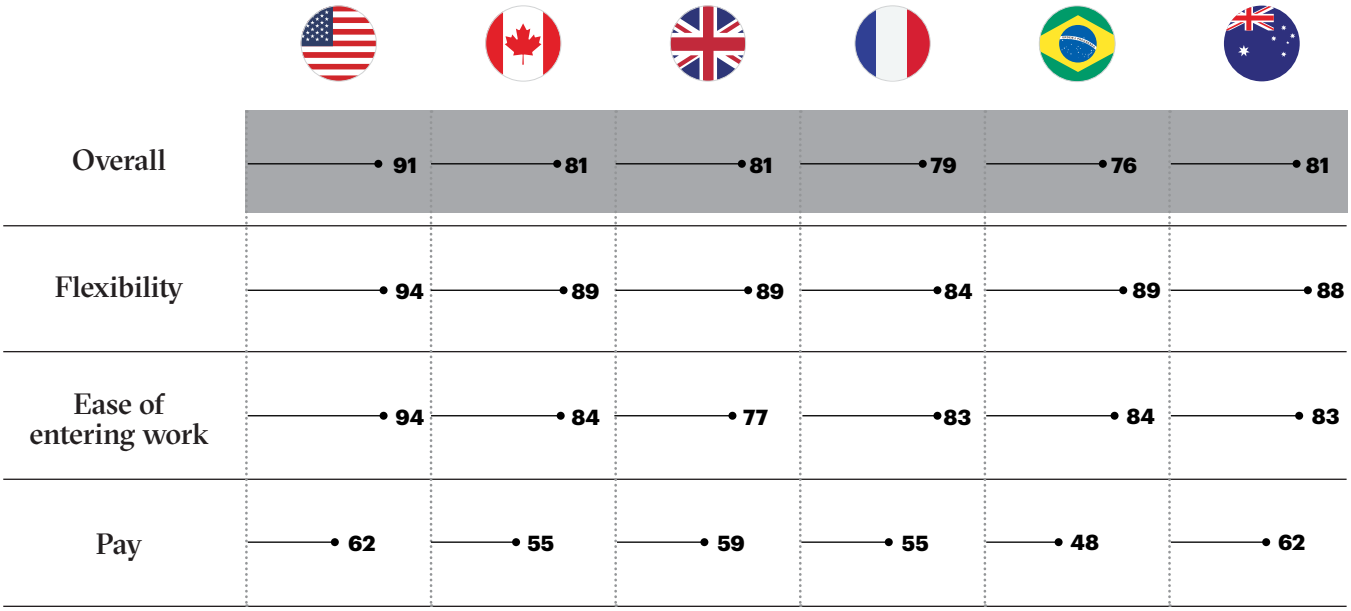
EXHIBIT 8

Between 76% and 91% of rideshare and delivery workers who started during the pandemic were satisfied with their work

Platform worker satisfaction by country and type of satisfaction

% of platform workers who started during the pandemic and reported satisfaction with their overall work during the pandemic[1]



1. High levels of satisfaction defined as workers who reported 6 or over out of 10 for each of the aspects of work
Source: YouGov and Accenture (2021), Accenture analysis

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VARYING HEALTH AND ECONOMIC CONDITIONS HAVE CREATED DIFFERENT EXPERIENCES FOR PLATFORM WORKERS IN DIFFERENT MARKETS THROUGHOUT THE PANDEMIC

3.

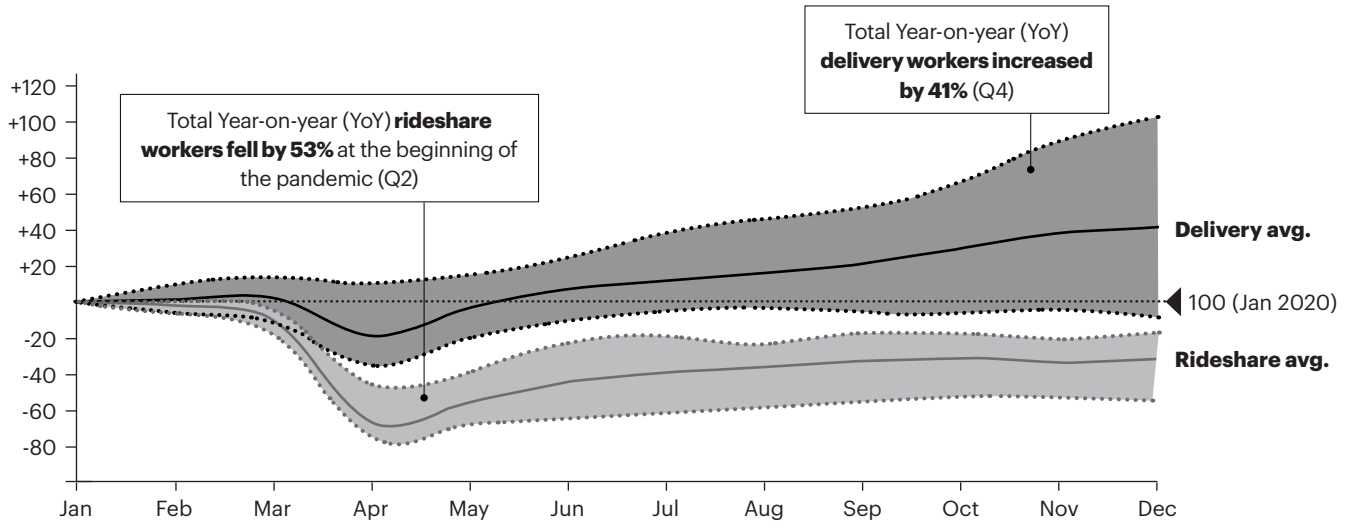
In Section 2, we outlined the key motivating factors for workers who participated in rideshare and delivery work as the pandemic evolved and common patterns that emerged across different countries. This section attempts to understand some of the variations between countries and over time (health, macroeconomic and regulatory factors) and looks at possible explanations for the differences in the experience of rideshare and delivery workers through the crisis.

EXHIBIT 9

The number of rideshare workers fell and remained below pre-pandemic levels, while the number of delivery workers increased in most countries

Active rideshare and delivery workers[1] over 2020

% change in the number of active workers since January 2020 (100), includes the US, Canada, UK, France, Brazil, and Australia



Note: 1. Undertook more than four trips in the month; ranges represent the max and min of the 6 countries studied
Source: Uber administrative data (2021), Accenture analysis

This section outlines an initial framework to explore the different factors that have contributed to the number of active platform workers during the COVID-19 crisis. The framework and potential significance assessments have been developed using a combination of expert interviews and literature reviews.[88] Each factor has been assessed on a three-point scale, from "low significance" to "high significance." More research and analysis is required to better understand the impacts and significance of these factors. Importantly, insights in this section are subject to significant change as the pandemic is ongoing and these are early trends.

88 The framework has several limitations, including country-specific supply and demand characteristics that have an impact on the number of active platform workers (for example, city dynamics, local labor market conditions, and key sources of demand for rideshare and delivery services) and the interaction between different factors (for example, unemployment, government restrictions, government support, and the number of COVID-19 cases)

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EXHIBIT 10

Several factors can help explain variations in the number of active rideshare and delivery workers across countries

● Factors selected for further analysis

	Factor	Description	Potential significance	Rationale
Health factors	Health risks	Likelihood of contracting COVID-19 while working	**H–M**	Higher likelihood of contracting COVID-19 makes work (esp. rideshare) more risky, reducing the supply of workers
Macro-economic factors	Lockdowns and restrictions	Intensity and duration of government restrictions	**H**	Strict restrictions reduce rideshare demand and availability of work. Restrictions also increase food delivery volumes, increasing supply and creating more work opportunities
	Unemployment	People without a paid job who are actively seeking work	**H–M**	High volumes of people looking for work can increase supply, as some people turn to platform work for easy access to an income
	Government support during COVID-19 crisis	Financial support during the pandemic	**H–M**	Government support (e.g. unemployment benefits, wage subsidies) can replace income otherwise obtained from work, reducing the need for some workers to work
Local market conditions	Ease of getting started	Requirements to meet before starting work	**H**	Mostly relevant to rideshare, lower barriers to entry (e.g. licenses, other requirements) make it easier for workers to start, stop and switch work
	Platform earnings	Expected or actual income from work	**H**	Higher earnings, driven by an increase in demand relative to supply, encourage workers to increase the amount they work (until a rise in supply decreases earnings)
	Availability of other work	Ease of access to other comparable work	**M–H**	Limited availability of other entry-level work makes platform work more desirable for current and new workers
	Local market wages	Prevailing labor market conditions and work availability	**M–H**	Higher local market wages for comparable work makes platform work less desirable
	Costs of work	Fixed and ongoing costs of platform work	**L–M**	High costs (esp. rideshare) can impact worker profitability, reducing the incentive to work
	Public perception	Intangible value and reputation of work	**L**	Higher public regard can improve the attractiveness of platform work, increasing supply
	Market penetration	Uptake of platform apps	**L**	Higher consumer demand for platform services increase incentives for workers and platform work supply

Notes: H = high, M = medium, L = low
Source: Desktop research, expert interviews and Accenture analysis

Government restrictions, unemployment, the extent of government support, and the ease of signing on to a platform impact on the number of people making themselves available for work in the sector. These factors are further analyzed here.

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3.1 Platform workers are dynamic and responded to changes in demand during the pandemic

Constantly changing restrictions highlighted the value of a dynamic workforce

On-demand platform work, by definition, enables workers to enter, change, and leave work as their circumstances change. Typically, the factors that drive these choices are dominated by personal circumstances and individual preferences. COVID-19 and its health and economic consequences introduced a range of new pressures and a greater degree of uncertainty for workers.

Throughout the pandemic, governments around the world introduced lockdowns and restrictions, which affected the level of economic activity. During lockdowns, many countries restricted non-essential travel and social gatherings, functionally reducing the demand for rideshare services. At the start of the pandemic, when most countries in this study implemented stringent restrictions, the number of active rideshare workers on Uber's platform was consistently 50% below pre-COVID levels.[89] The UK faced some of the most prolonged and toughest lockdowns in the world.[90] As the following graphic shows, the number of active rideshare workers quickly fell during strict government restrictions, and rose when they were eased.

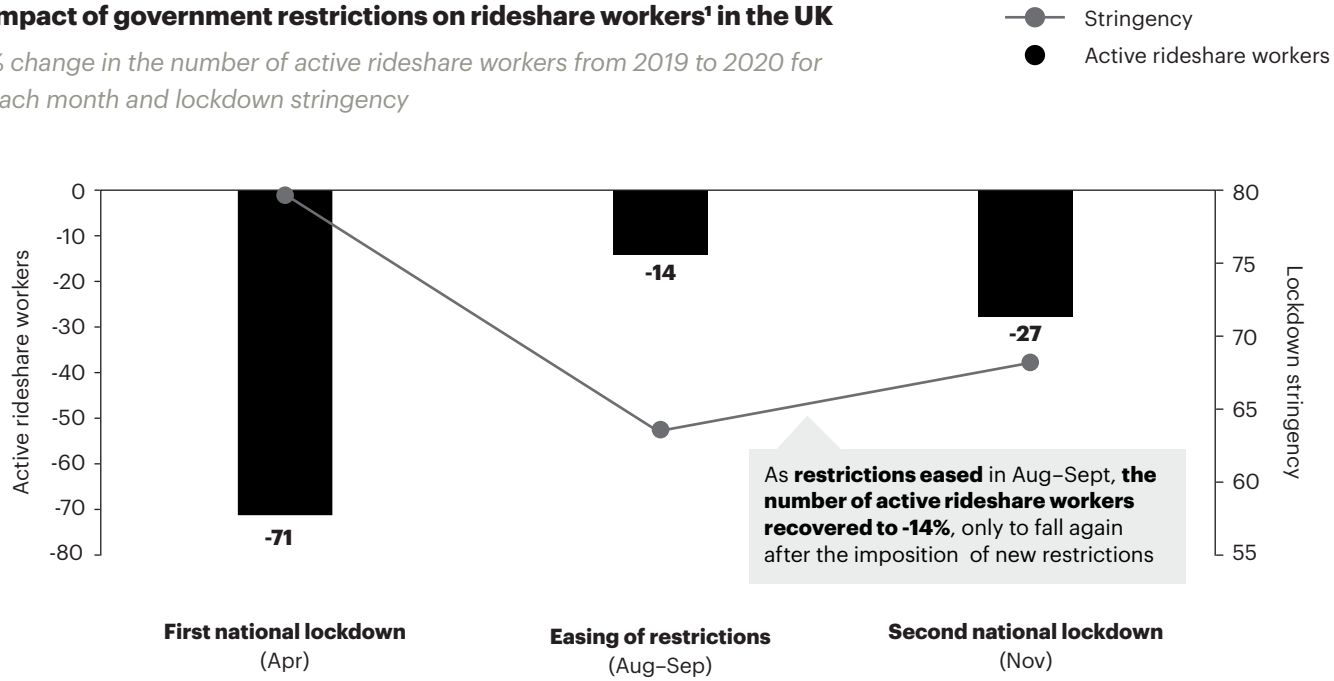
This helps to highlight how the dynamic nature of platform work enabled drivers to swiftly return to work when conditions allowed.

CASE STUDY 2: United Kingdom

Government restrictions and lockdowns influence the number of active rideshare workers

Impact of government restrictions on rideshare workers[1] in the UK

% change in the number of active rideshare workers from 2019 to 2020 for each month and lockdown stringency



Note: The UK entered a third national lockdown in January 2021; 1. Refers to workers who undertook more than four trips in the month
Source: Uber administrative data (2021), Accenture analysis, Oxford University (2021) COVID-19 Government response tracker

89 This is the year-on-year change from the second quarter 2019 to the second quarter 2020 for Australia, Brazil, Canada, France, the UK and the US, based on Accenture analysis of Uber administrative data (2021)
90 The UK had three national lockdowns, totalling five months, between 2020 and 2021, and had the highest median score on the Oxford University stringency index out of the six case study countries

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Some rideshare workers responded to the challenges of COVID-19 by picking up delivery work

In some countries, rideshare workers accessing work through Uber can switch between rideshare and delivery at the touch of a button. To compensate for lost rideshare work, many workers began fulfilling delivery trips. In the US, Canada, and Australia, the proportion of rideshare workers completing delivery trips doubled compared to the same time in 2019.

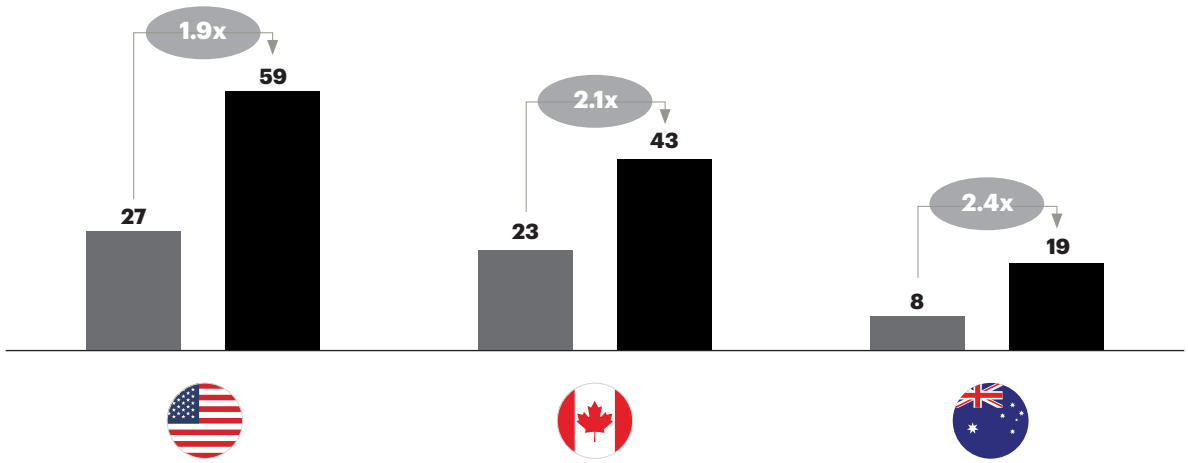
However, not all existing platform workers are willing or able to switch between different types of platform work. In France and the UK, for example, private hire vehicle drivers are professionalized and the barriers to entry are significantly higher, incentivizing workers to work longer and making their decision to go online less responsive to changes in demand.

EXHIBIT 11

Rates of rideshare workers delivering doubled compared to the same time before the pandemic

Rideshare workers delivering

% rideshare workers completing a delivery trip in the past month



Note: Defined as the percentage who take delivery trips among all drivers who are eligible to take rideshare trips. France, the UK, and Brazil are excluded because workers in these countries are not able to easily switch from rideshare to delivery

Demand for delivery supported a stronger rebound in platform work than in other sectors

The growth in demand for delivery services combined with the ease of access to and flexibility of rideshare and delivery work has enabled platform work to rebound faster than other sectors affected by COVID-19, as shown in the below case study. Platform workers can return to work when it suits them, often considering factors such as demand, COVID-19 risk, and personal commitments. In many countries, rideshare and/or delivery work was classified as essential, allowing a quicker return to work.

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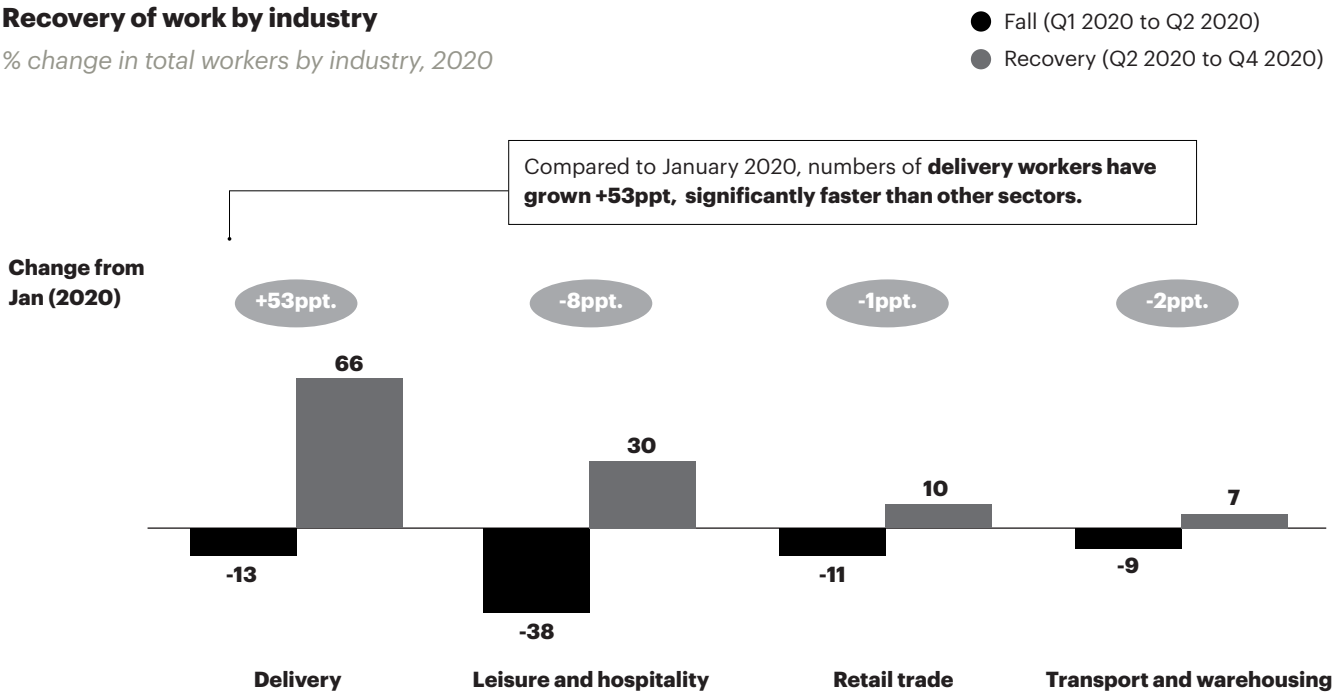
CASE STUDY 3: United States

Delivery rebounded much faster than other sectors of the economy

Recovery of work by industry

% change in total workers by industry, 2020



Note: Based on total monthly employment by North American Industry Classification System (NAICS) Supersectors
Source: Uber administrative data (2021), Accenture analysis, Bureau of labor statistics (2021)

3.2 Delivery work was an alternative source of income for people who did not qualify for government help, acting as a source of financial security

The pandemic shows that platform work can play an important supporting role in times of crisis. 64% of new platform workers surveyed had either lost work, stopped working temporarily, or faced reduced hours.[91] While government support did cover many workers impacted by the pandemic, 60-75% of workers surveyed who started delivering during the pandemic claimed that they were ineligible or did not access government support. For workers in this category, platform work offered an alternative source of income for some workers.

Among survey respondents, reasons for not accessing government support in the US include: income too high (27%), difficult or time consuming to access (13%), lack of work history (12%), worker or visa status (11%). Other eligibility criteria also affected accessibility. In Australia, for example, certain types of workers like casual or shift workers without guaranteed hours of work were excluded from support. 78% of Australian survey respondents who began platform work during the pandemic agreed platform work acted as a financial safety net during the pandemic. Such a safety net has not been available in previous crises.

Across all study countries, many platform workers who joined during the pandemic used platform work as a safeguard: on average, three quarters (77%) of new platform workers surveyed said that platform work acted as a financial safety net. This was not just important for those who were not eligible for government support. Of those new platform workers who did receive government support, 69% said that those benefits did not relieve most of their financial pressure.

91 33% of new workers joining during COVID-19 had lost a job before joining, 10% had temporarily stopped work and an additional 21% faced reduced hours

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EXHIBIT 12

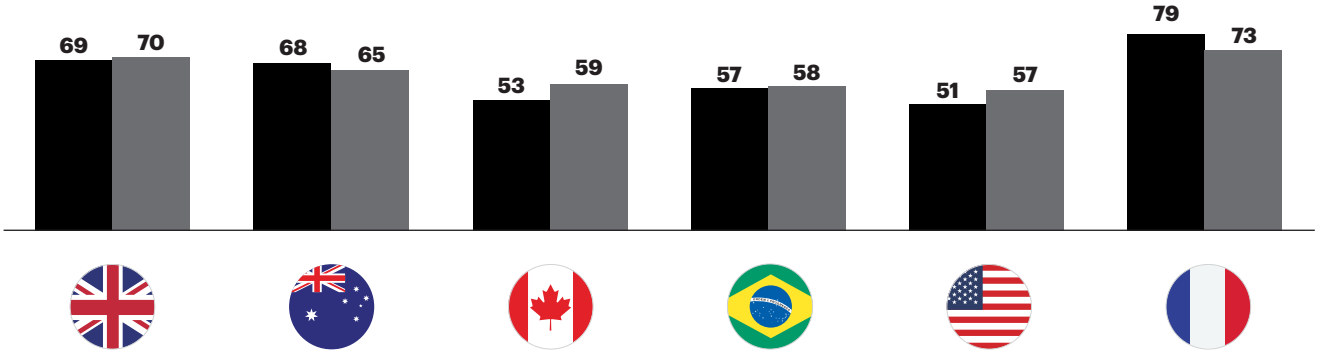
More than half of new platform workers were ineligible or did not access government support and more than 55% had lost a job prior to signing up

New delivery workers have been impacted by COVID-19

% of new platform workers who were active during the pandemic

- Did not access government support
- Lost job or reduced hours

Platform work acted like a safety net for workers impacted by the pandemic. **51-79%** of new platform workers were **ineligible or could not access government support** and **57-73% had lost work or experienced a decline in hours prior to signing up**



Notes: sample size ranges between n = 268 and n = 719 depending on country and question
Source: YouGov and Accenture (2021), Accenture analysis

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Box 3.2.1

Governments have played an important role supporting rideshare workers through the crisis

In most countries where Uber operates, platform workers are self-employed or work as independent contractors, meaning they typically do not receive from platforms the same benefits and protections an employee would receive from their employer, such as unemployment benefits, sick leave, and other forms of paid leave.[92] A lack of access to sick pay has been particularly challenging for workers during this health crisis, forcing some to choose between earning income and isolating to protect their communities. Some platform companies have rolled out initiatives to give workers temporary financial assistance during isolation or quarantine (see Section 4.1).

In response to the COVID-19 crisis, many of the countries considered in this study have provided unprecedented levels of support. Governments have offered wage supplements or income replacement programs, increased access to unemployment benefits and paid sick leave, and provided loans at favorable rates to some businesses.[93] Many governments have also expanded emergency entitlements to independent workers.[94] Around the world, rideshare and delivery workers have been able to access unemployment benefits, wage supplements, loans, tax deferrals, and other benefits made available to small businesses.

Government support (non-exhaustive)

- Assistance for individual micro-entrepreneurs, informal workers without registration, and individual taxpayers
- R$600/month between April-August, reduced to $R300/month until December

- Canada Emergency Response Benefit (CERB) (CA$500/week)
- The Canada Recovery Benefit replaced CERB (CA$1,000 for a 2 week period, individuals can apply up to 19 times)

- Federal Pandemic Unemployment Compensation (US$600/week April 4-July 25 2020)
- Pandemic Unemployment Assistance (amount varies)

- There have been four Self-Employment Income Support Scheme (80% of average monthly trading profits covering 3 months, capped at £7,500)

- Solidarity fund (monthly flat rate assistance of €1,500 until June 2021)
- Aid from the Bpifrance and Banque de France

- JobKeeper payment (AU$750/week for up to 6 months)
- Coronavirus Supplement (AU$225/week)
- Temporary early releases on superannuation

Source: Government websites; Uber websites; Accenture analysis

92 OECD (2020) Tax and fiscal policy in response to the Coronavirus crisis: Strengthening confidence and resilience
93 OECD (2020) Tax and fiscal policy in response to the Coronavirus crisis: Strengthening confidence and resilience
94 In the US, the federal Coronavirus, Aid, Relief, and Economic Security (CARES) Act of March 2020 included a provision expanding unemployment insurance benefits to self-employed and gig economy workers

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Delivery earnings on Uber have stabilized in most countries

The initial impact of the pandemic on delivery weekly earnings on the Uber platform was mixed.[95] Australia, Canada, France, and the US all saw year on year increases in median weekly earnings of between 28% and 116% during the second quarter of 2020. This was likely driven by sharp rises in demand for delivery services during lockdowns in these countries. Conversely, Brazil and the UK experienced less demand growth early in the pandemic and saw declines in year on year median weekly earnings of between 5% and 18%.

By the fourth quarter of 2020, median weekly earnings for delivery work with Uber were either higher or just below par with 2019 earnings. For example, in Q4 2020, year on year median weekly earnings were between 8% and 42% higher than the same time the year prior in Australia, Canada, France, and the US. Median earnings in Brazil and the UK were between 2% and 7% below prior year earnings during Q4.

3.3 As consumer demand fell and the unemployment rate rose, more workers turned to delivery work

The shutdown of economic activity led to a sharp rise in unemployment in most countries around the world. As unemployment rates increased and the availability of work decreased, many individuals looked to delivery work as a source of income. Past studies from various countries have found that between 7% and 25% of platform workers were unemployed before starting platform work.[96]

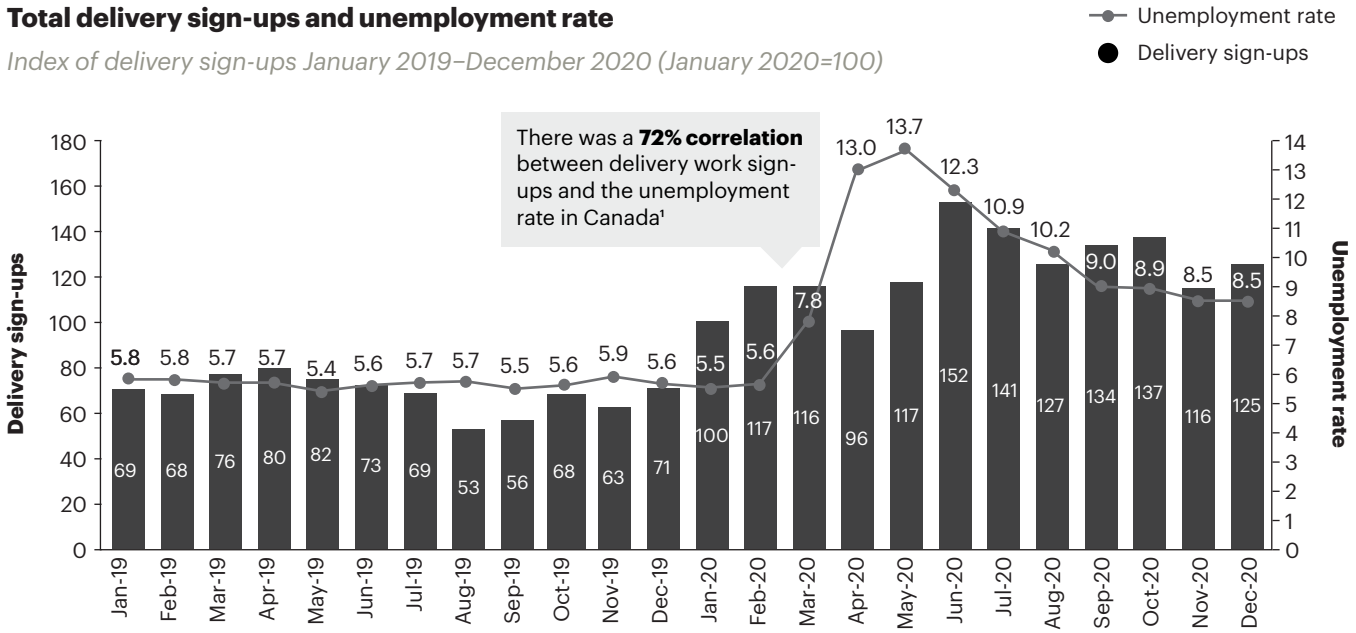
In January 2020, Canada's unemployment rate was 5.7%. By May 2020, it had peaked at 13.7% and stayed around 9% until December 2020. With many people still looking for work, more turned to delivery work as a source of income, as evidenced by the strong relationship between the unemployment rate and total delivery sign-ups on Uber's delivery platform: as the unemployment rate rose, the number of sign-ups also increased.[97]

CASE STUDY 4: Canada

In Canada, delivery sign-ups followed the unemployment rate, giving people alternative opportunities to access work

Total delivery sign-ups and unemployment rate

Index of delivery sign-ups January 2019–December 2020 (January 2020=100)



Notes: Correlation based on 24 months of data for Canada (monthly unemployment rate and monthly delivery sign-ups). While there is a strong correlation between unemployment and delivery sign-ups, it is important to note that there may be other variables, which may confound results
Source: Uber administrative data (2021), OECD (2021), Unemployment rate (indicator), (Accessed on 05 March 2021)

95 Median weekly earnings including tips
96 Strong correlation between the number of drivers active with Uber and the unemployment rate. Landier, Szomoru and Thesmar (2016) Working in the On-Demand Economy; An Analysis of Uber Driver-Partners in France; EDR Group (2018) Uber in the Economy, AlphaBeta (2019) Flexibility and fairness: What matters to workers in the new economy, Hall and Krueger (2016) An analysis of the labor market for Uber's driver-partners in the United States
97 A strong, positive correlation of 72% was identified between these two variables for Canada, based on unemployment rates and delivery sign-up data for 24 months between January 2019 and December 2020. A weaker correlation was observed in the US, the UK and France and no such relationship was observed in other countries

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Delivery work created alternative working opportunities for groups of people hit hardest by the pandemic

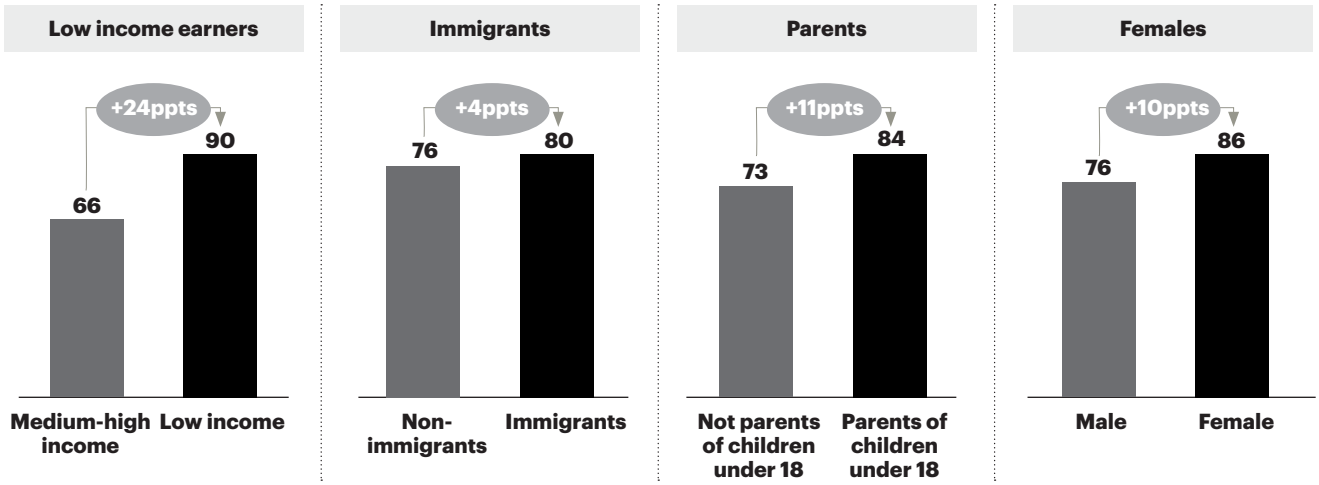
COVID-19 disproportionately impacted certain groups in society (see Box 1.1.1). For many of the people surveyed, platform work provided an accessible, non-discriminatory source of income. In the US, the survey showed platform work provided financial opportunities for groups hardest hit by the pandemic, particularly low-income workers, parents with young children, and women, to meet their financial needs.[98] For example, 86% of new platform workers who were women would not have been able to meet some of their financial needs during the pandemic without platform work, compared to only 76% of men.

CASE STUDY 5: United States

Platform work provided important support to groups hardest hit by the pandemic

Importance of platform work for new platform workers by affected group

% of respondents who would not have been able to meet some of their financial needs during COVID-19 without platform work



Note: Low income is defined as annual income <$29,999, medium-high income is defined as annual income $30,000-$99,999; immigrant is defined as anyone not born in the US
Source: YouGov and Accenture (2021), Accenture analysis

98 The profile of a platform worker varies significantly by country.

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Motivated by the desire for greater flexibility, studies found that many women self-select into independent forms of work.[99] Flexible platform work gives people the ability to earn income without needing to compromise other responsibilities. Recent research suggests that efforts to restrict the flexibility of independent work can also impact groups like women who need flexibility the most.[100]

New delivery workers came from roles across the economy but especially from sectors that were hardest hit by the pandemic

Workers from across the economy flocked to delivery work during the pandemic which reflected the broad-based appeal, and relatively low cost and skills barriers to undertake this work.

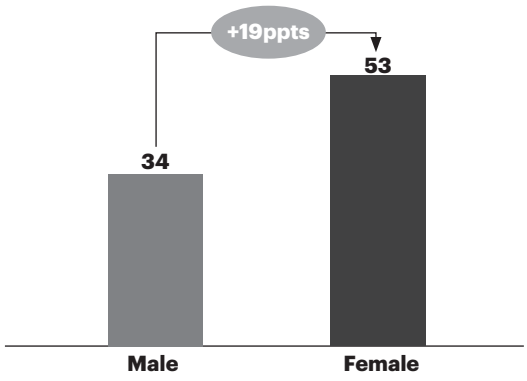
Many of the people who started platform work during the pandemic had been employed in industries that were particularly hard hit. More than a quarter (28%) of new platform workers surveyed were previously working in sectors hit hardest by the pandemic such as hospitality and food, retail and wholesale, and arts and recreation. Furthermore, only 14% of new platform workers came from private transport or delivery sectors, meaning that the majority of new workers were not substituting existing work with similar platform work. Of these new platform workers, 33% had lost work, 31% faced reduced hours or temporarily stopped work, and 36% were still working in this work since joining platform work.

CASE STUDY 6: United States

Platform work provided opportunities for women surveyed

Platform work offered opportunities for women to work

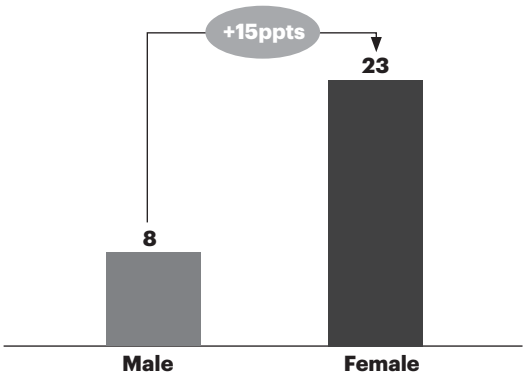
% of new platform workers surveyed who said that not being able to find other work was a motivation for joining platform work



Women were more likely to say that they could not find another job compared to men

Women surveyed were more likely to be undertaking caregiving activities while working during the pandemic

% of new platform workers surveyed, by gender



Women were more likely to undertake caregiving activities while undertaking platform work compared to men

Source: YouGov and Accenture (2021), Accenture analysis

99 Palagashvili and Suarez (2021) Women as Independent Workers in the Gig Economy
100 Palagashvili and Suarez (2021) Employee vs. Independent Worker: A Framework for Understanding Work Differences; Chen et al. (2020) Suppliers and Demanders of Flexibility: The Demographics of Gig Work

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EXHIBIT 13

Workers who signed up during the pandemic are more likely to be from sectors hardest hit by the COVID-19 pandemic such as hospitality and retail

Previous sector of work by main sectors impacted by COVID-19

% of new platform workers by sector

	Top sector	Second sector	Third sector
	Hospitality: 15%	Retail: 8%	Manufacturing: 8%
	Hospitality: 12%	Retail: 11%	Manufacturing: 10%
	Hospitality: 19%	Private transport: 11%	Retail: 11%
	Hospitality: 15%	Transport of goods: 13%	Retail: 8%
	Hospitality: 28%	Retail: 11%	Private transport: 5%
	Retail: 14%	Transport of goods: 10%	Admin services: 10%

Source: Uber administrative data (2021)

3.4 Drivers were more likely to continue driving when Uber was their primary source of income

Drivers in countries where it takes longer or costs more to get on the platform tend to work more hours: drivers must be relatively committed to recoup their initial investment of time, effort, and cost when signing up. Accordingly, in the UK and France, drivers work longer on average than in other studied countries, with roughly a third of drivers working greater than 25 hours[101] per week compared to a sixth of workers for other countries. Drivers studied in both of these countries are therefore less likely to have another job outside of rideshare or private-hire work. This may help to explain why a larger share of drivers in these two countries remained active during the pandemic.

101 Includes engaged time: en route to the rider or restaurant, and on trip.

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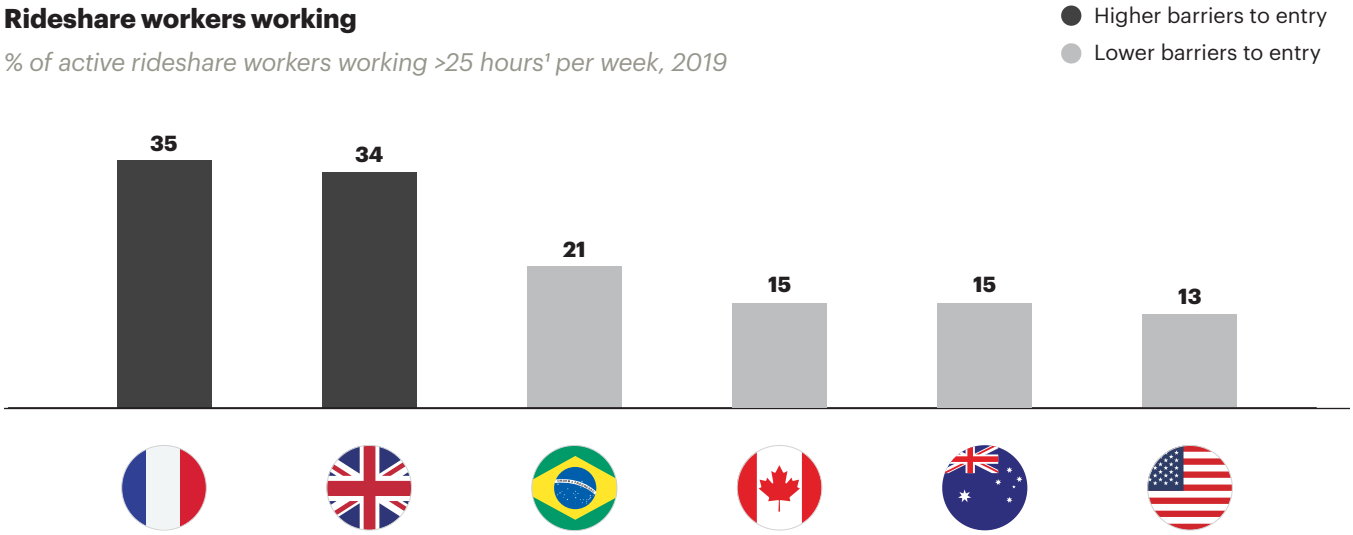
As many drivers in France and the UK remained on the platform even while demand was curtailed by public health restrictions, the amount of work available for each remaining driver shrank dramatically: as of Q4 2020, median weekly earnings for drivers in these countries were significantly lower than in the previous year. Meanwhile, even as demand remained depressed in the US and Canada at the end of 2020, weekly earnings of the drivers studied remained stable at or above their pre-COVID levels for the drivers who remained active.

EXHIBIT 14

Workers spend more time on the platform in countries where it takes longer or costs more to get on the platform

Rideshare workers working

% of active rideshare workers working >25 hours[1] per week, 2019



Notes: 1. Hours refer to engaged hours (en route to the rider or restaurant, and on trip)
Source: Uber administrative data (2021), Accenture analysis

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PLATFORM WORK PLAYED A ROLE IN PROVIDING ALTERNATIVE SOURCES OF INCOME FOR WORKERS AND MAINTAINING ECONOMIC ACTIVITY DURING COVID-19

4.

4.1 Platform work provided alternative sources of income and maintained economic activity during the pandemic

Platform work provided earning opportunities to millions of workers around the world during the pandemic. In 2020, Uber facilitated the transfer of over US$22 billion in earnings to rideshare drivers and delivery workers.[102]

Platform work enabled consumers access to essential rideshare and delivery services throughout the pandemic. Rideshare emerged as a socially-distanced transportation option, supporting essential workers to get to work and get deliveries.[103] Delivery allowed millions of consumers to access food and groceries without needing to leave home, thereby minimizing travel for vulnerable groups.

Digital delivery platforms have also made it feasible for many small businesses such as restaurants and corner stores to continue operating during the pandemic. By offering alternative channels and increasing visibility to customers, and providing the ability to promote offers, platforms have been able to enhance productivity and profitability for some small businesses.[104] The number of active partnered restaurants on Uber Eats grew by over 75% year on year in 2020.[105] Small restaurants in particular experienced a significant increase in the number of orders, benefiting from the low capital costs of using third-party delivery platforms.[106] A study in the US and Canada found that 81% of restaurants would have had to lay off staff members and 75% of restaurants would have had to shut down if not for the opportunity afforded by delivery platforms.[107] A study in Australia found that spending on food delivery was quick to substitute for restaurant spending during COVID-19.[108] It is noteworthy that while restaurant spending has returned to normal levels, spending on food delivery continues to be three times higher than pre-COVID levels in Australia.[109] Platforms like Uber Eats have also supported local commerce through initiatives like delivery-only[110] and zero commission pick-ups.

Platform work also facilitated consumer access to rideshare and delivery services throughout the pandemic.

102 Uber (2021) Uber Announces results for Fourth Quarter and Full Year 2020
103 USA Today (2020) Uber to offer 10 million free rides, deliveries to health care workers, seniors during COVID-19 pandemic; USA Today (2020) Over 200,000 health care workers receive discounted Lyft rides
104 ILO (2021) World employment and Social Outlook: The role of digital labour platforms in transforming the world of work; Accenture (2021) Making Delivery Work for Everyone, March 2021
105 There are now more than 600,000 restaurants on the Uber Eats platform. Uber (2021), Uber Announces results for Fourth Quarter and Full Year 2020
106 Raj, Sundararajan and You (2020) COVID-19 and Digital Resilience: Evidence from Uber Eats
107 Technomic (2020) The impact of third-party delivery during the COVID-19 pandemic
108 Accenture (2021), Making delivery work for everyone, March 2021
109 Accenture (2021), Making delivery work for everyone, March 2021
110 Delivery-only enables restaurants to take the orders without Uber's ordering infrastructure. This enables restaurants to deliver with Uber Eats at a lower service charge

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4.2 Platform work provided an important connection to the labor market and protected some workers from the economic impact of the pandemic

Typically there is a very significant time lag in recovery of labor market outcomes following an economic crisis; in some cases, the market does not fully recover.[111] Following the global financial crisis, job growth, employment-population ratios, and wage increases remained well below pre-recession levels for several years.[112] Some estimates suggest that 42% of COVID-19 layoffs could be permanent, representing a reallocation shock for some economies.[113, 114]

Workers who have lost their jobs or faced reduced hours are particularly vulnerable to the longer-term impacts of recessions. Lack of work opportunities can force impacted workers to take up lower-wage jobs or remain unemployed. Even temporary unemployment can be harmful, degrading skills, impacting motivation, routines, and attitudes towards work as well as overall wellbeing, social connection, and sense of community. Multiple studies suggest that, the longer an individual is unemployed, the harder it is for them to access work.[115]

The survey for this study found that platform work can mitigate unemployment during the initial stages of the pandemic with some workers stating that it enabled them to acquire skills and capabilities that may help them in the future.

- Across the six focus countries, between 10% and 24% of survey respondents were unemployed prior to starting platform work during the pandemic. Brazil (24%) and France (23%) had the highest proportion of new workers who were unemployed prior to joining. Furthermore, more than half of these workers had been unemployed for more than 6 months.
- Platform work can support individuals to develop and maintain important interpersonal competencies, including customer service, language proficiency, and entrepreneurship. 65% of new platform workers surveyed agreed that platform work had provided them with relevant skills and capabilities to find a new job and 59% said that they gained and increased customer skills from platform work. 19% of new platform workers were also undertaking study while working during the pandemic.

This may contribute to a more positive outlook. 76% of new platform workers surveyed reported being optimistic about their future work opportunities and prospects.

4.3 Despite variations across countries, this study demonstrated that platform work was resilient and able to support work opportunities and economic activity during the pandemic

Over the past decade, platform work has become an established feature of the labor market. While it continues to be relatively small, the segment of the workforce looking for flexible work will be well placed to serve continued growth in demand for rideshare and delivery services. The pandemic has provided a timely reminder that the key challenges facing economies are mass labor disruption through unemployment, underemployment, and non-participation.

In the context of the pandemic, platform work provides a source of income for those with no access to traditional safety nets, or for those seeking to augment their income while getting to grips with the new realities of life during and after the pandemic.

111 Hinkley and McCorkell (2019) The Post-Recession Labor Market: An Incomplete Recovery
112 Rothstein (2017) The Great Recession and its aftermath: What role for structural changes?
113 Barrero et al. (2020) COVID-19 Is Also a Reallocation Shock
114 However, some authors disagree about the reallocation impacts of the pandemic, suggesting cross-industry reallocation might be a misconception. Barrero et al. (2020) COVID-19 Is Also a Reallocation Shock
115 Cassidy et al. (2020) Long-term Unemployment in Australia; Kroft et al. (2013) Duration Dependence and Labor Market Conditions: Evidence from a Field Experiment, Quarterly Journal of Economics 128(3): 1123–1167; Eriksson and Rooth (2014) Do Employers Use Unemployment as a Sorting Criterion When Hiring? Evidence from a Field Experiment, American Economic Review 104(3).

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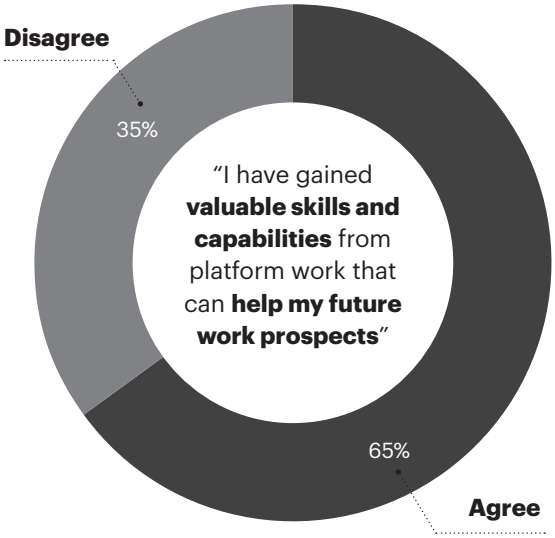
EXHIBIT 15

Platform work helped some individuals develop and maintain important skills

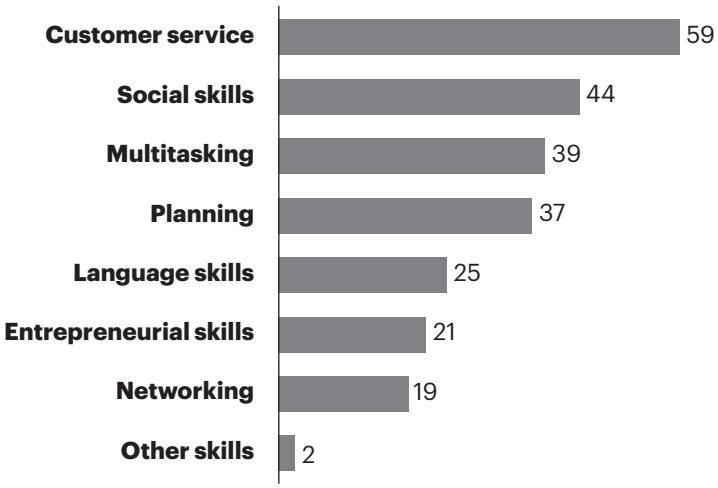
65% of workers report that they have gained skills from platform work that can help future work prospects

% of respondents who said platform work provided them with skills (n=2797)



Customer service, social skills and multitasking skills were commonly identified skills acquired from platform work

% of respondents (n=3150)



Note: Based on average of weighted responses across six focus countries including US, Canada, UK, France, Brazil and Australia
Source: Uber administrative data (2021), Uber (2021) Global platform trends survey

4.4 Concluding remarks

In this paper we have shown that platform work has played a role in providing workers with opportunities during the initial stages of the COVID-19 pandemic and associated economic disruption. This is particularly so for those cohorts with disadvantaged access to traditional labor market opportunities. The extent to which it can act as a buffer or secondary safety net will be significantly impacted by local market conditions, including economic conditions and policy settings.

Offering a degree of flexibility and ease of movement between platform and other work will help to facilitate the transition as economies around the world reopen and vaccines continue to be delivered.

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METHODOLOGICAL APPENDIX

This report seeks to develop insights from the engagement of platform workers with the labor market through the beginning phases of the COVID-19 global pandemic using observed periodic changes. This report uses four key data sources: a worker survey, Uber administrative data, academic papers, and various publicly available data sources. The economic analysis for this report was conducted by Accenture.

Worker survey

Leading survey provider YouGov conducted a worker survey in Australia, Brazil, Canada, France, the UK and the US, with between 553 and 1,044 respondents per country, and a total of 4,941 respondents, yielding a margin of error of approximately ±1%. However, sample size may vary depending on survey cuts used.

Two populations were targeted for the survey: delivery and rideshare workers who became active workers[116] during COVID-19 (referred to throughout as new platform workers) as well as those who became inactive at the onset of COVID-19.[117]

The survey was completed online and involved up to 60 questions and took about 15 minutes to complete.[118]

The survey consisted of three main sections. This included:

- Driver characteristics such as the type of platform work they do (e.g. rideshare and/or delivery), time spent on the platform, other activities drivers may engage in outside of platform work, and number of apps used for platform work
- Driver experience such as motivations for starting and/or stopping platform work, satisfaction with platform work, access to government support, importance of platform work as a source of income, and skills gained from platform work
- Driver demographics[119] such as age, gender, income, ethnicity, and nationality

We have weighted the survey data to ensure the samples are representative of rideshare and delivery workers on Uber's platforms in these countries. The data is weighted on demographic data including age and gender, locational data and engagement with platform work including hours worked, income earned, and whether workers are active or inactive. This data provides insights into the demographics, motivations, and experiences of workers before and during the pandemic. Neither Uber nor Accenture received personally identifiable survey responses. In the survey, workers were assured of this and encouraged to answer honestly. Questions were appropriately localized.

Uber administrative data

Given that Uber is the only major global platform engaged in both ridesharing and delivery, their administrative data is an invaluable source for understanding the impact of the pandemic on platform workers.

The Uber data used in this report includes aggregated data covering more than 7 million delivery and rideshare workers in the same six countries between 2019 and 2020. Data used in this report includes worker sign-ups, active workers,[120] worker exits, median weekly earnings, median hourly earnings, and proportion of workers that completed over 25 hours of engaged time (en route to the rider or restaurant or on a trip or delivery) within a week. For the purposes of this study, earnings include tips and are gross of expenses and taxes owed by the driver. Hourly earnings are calculated over all online time (online and available for work, en route, or on a trip or delivery). This approach is consistent with previous research.

Existing studies and academic papers

Academic papers and publicly available data were also used to contextualize analysis, supplement data, and augment report findings. As part of this work, we have consulted/are also consulting with leading thinkers in this field from academic institutions and leading think tanks in each of the countries studied.

Publicly available data sources

This report also utilised data from public statistical agencies, international organisations, think tanks, and university institutes. Where such data is used, we have cited this work.

116 Based on workers who completed their first trip after March 16 2020 and completed more than 4 trips in the 28 days prior to January 2021
117 Took at least 4 trips in the 28 days prior to March 16, 2020, and none thereafter
118 Exact number of questions to completion time depends on respondent
119 Note, these questions were optional
120 Based on workers who have completed more than 4 trips in the past 28 days

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EXHIBIT 16

A wide range of data sources have been used for this report

Source: New, six-country survey for the report

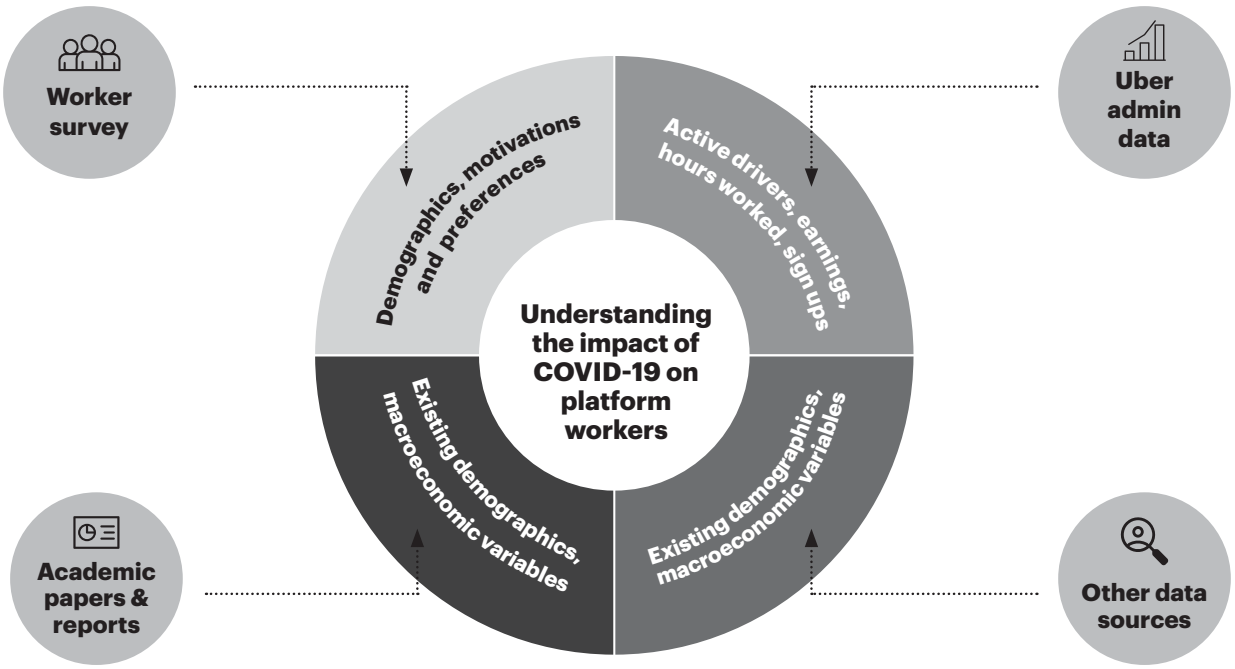
Sample: 4,941 delivery and rideshare workers across 6 countries

Use: Understanding worker demographics, motivations, and experiences

Source: Uber admin data

Sample: Aggregate data on over 2 million active drivers every month in 6 countries between 2019 and 2020 for rideshare and delivery workers

Use: Worker sign ups and exits, median earnings, and hours worked



Source: Multiple (e.g. ILO, OECD, Hall et al.)

Use: Augmenting and informing analysis and findings with other relevant reports and academic research

Source: Multiple (e.g. National Bureau Data, World Health Organization, and Oxford University Stringency Index)

Use: Contextualizing analysis through key macroeconomic variables and pre-pandemic data

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Disclaimer: The purpose of this report is to inform the general public and research community about trends in work on rideshare and delivery platforms during the COVID-19 pandemic, with a focus on the Uber platform.

The analysis in this report was commissioned by Uber and prepared by Accenture.

This content is provided for general information purposes and is not intended to be used in place of consultation with professional advisors.

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